NBS Project Requests

Student Guide

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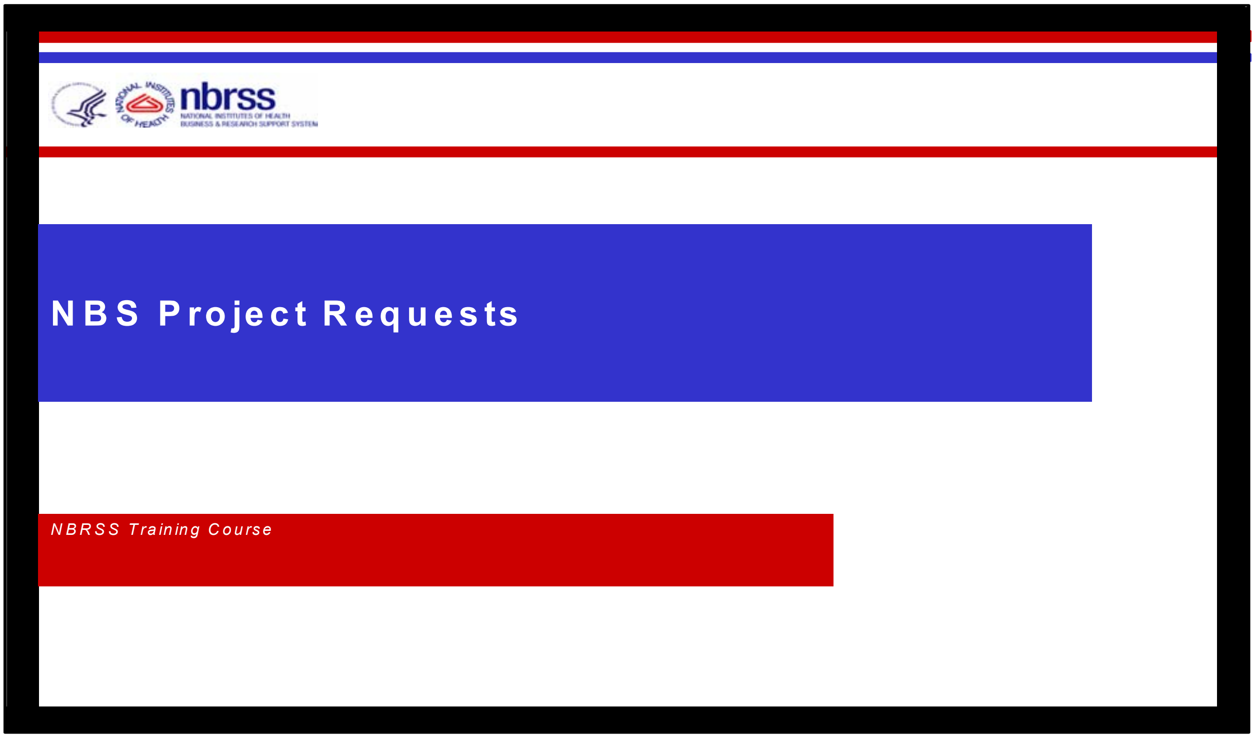

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Working with Oracle Projects

- Oracle Projects will be used to create all new Projects (CANs) and deactivate existing Projects in the NBS.
- The NBS provides electronic forms to capture new Project and deactivation requests. The New Project request form replaces the current paper-based CAN request form and includes data for both systems' (ADB and NBS) needs.
- Once created, each new Project Account will be associated with the appropriate ACS string, translated into a CAN and its related explosion values, and transferred to the ADB to support legacy CAN-based systems through an automated process.
- Every Project that is deactivated in Oracle will be deactivated in the ADB through an automated process.

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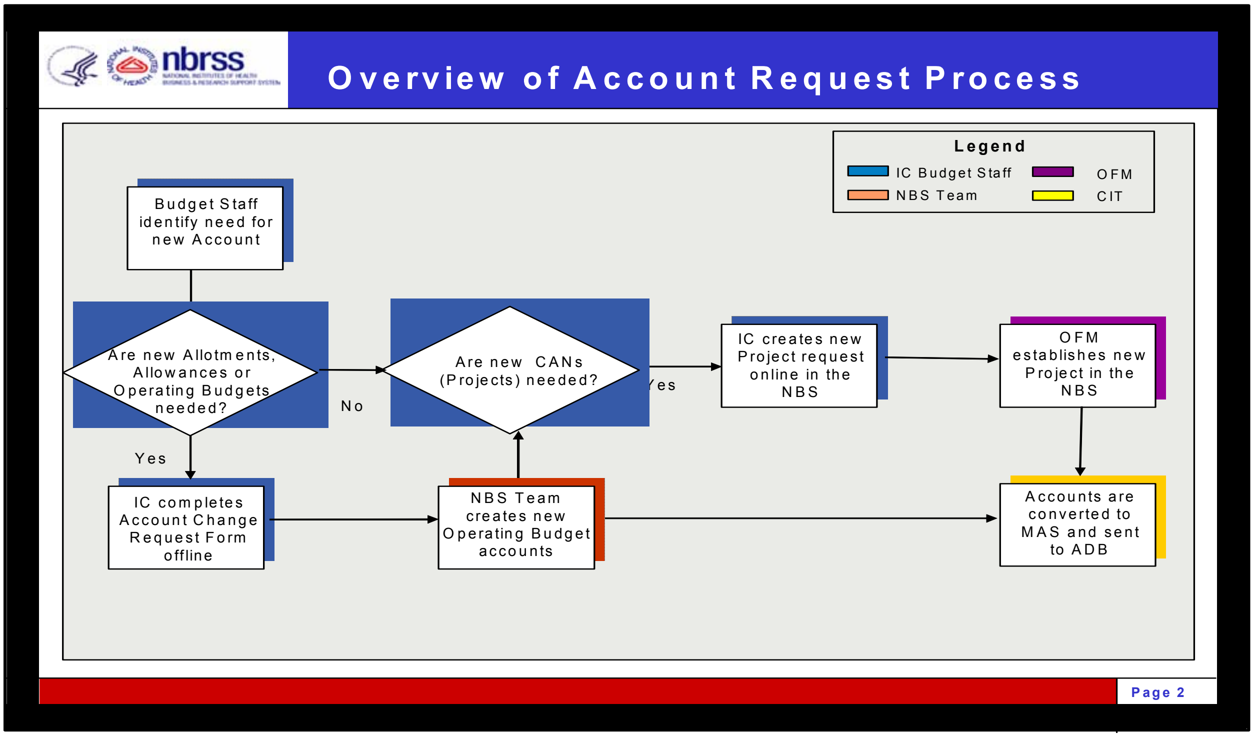
Overview of Account Request Process



- All new account requests for both the ACS and the MAS are now made through the NBS.

- New Allotment, Allowance and Operating Budget requests will be made using an offline form that is available on the NIH portal http://my.nih.gov – NBRSS Budget/Finance Community. These sheets will be completed and emailed to the NBS Project Team, who will set them up in the NBS.

- New CAN (Project) requests will be made using an NBS application that you will be working with in today's training.

- Once an account is created in the NBS, an automated process will convert it into the MAS format and forward the legacy CAN to the ADB.

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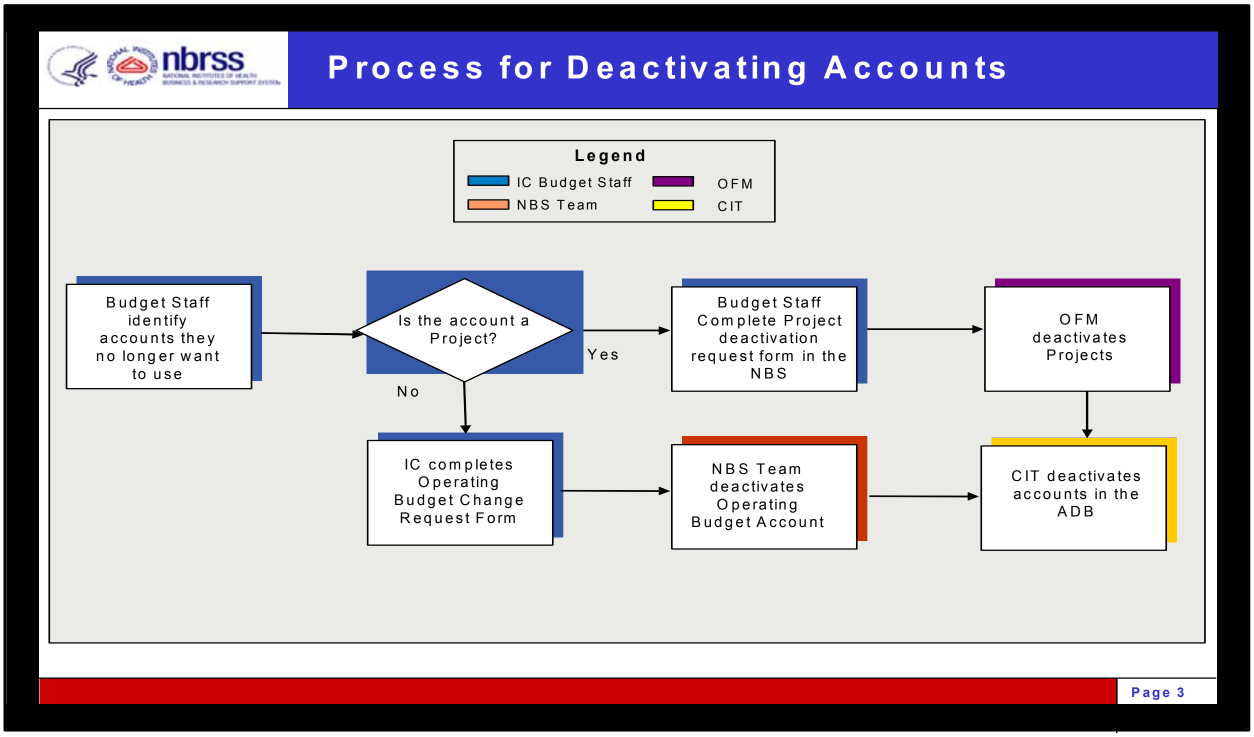
Process for Deactivating Accounts



- All account deactivations are also now made through the NBS.
- Allotment Allowance and Operating Budget deactivation requests will be made using form that is available on the NIH Portal. These sheets will be completed and emailed to the NBS Project Team, who will deactivate the requests accounts in the NBS.
- CAN (Project) deactivation requests will be made using the online NBS application.
- Once a Project is deactivated in the NBS, an automated process will forward the deactivation request to the ADB, where the related MAS CAN will be deactivated as well.

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Project Account Maintenance Tasks

Project Account Maintenance Tasks

IC Budget staff will be performing the following activities related to Projects:

- Entering new Project requests
- Receiving notification of approved Projects
- Checking the IC COA Log to determine status of Project requests
- Working with TASC to resolve problems with rejected projects
- Deactivating Projects that are no longer used

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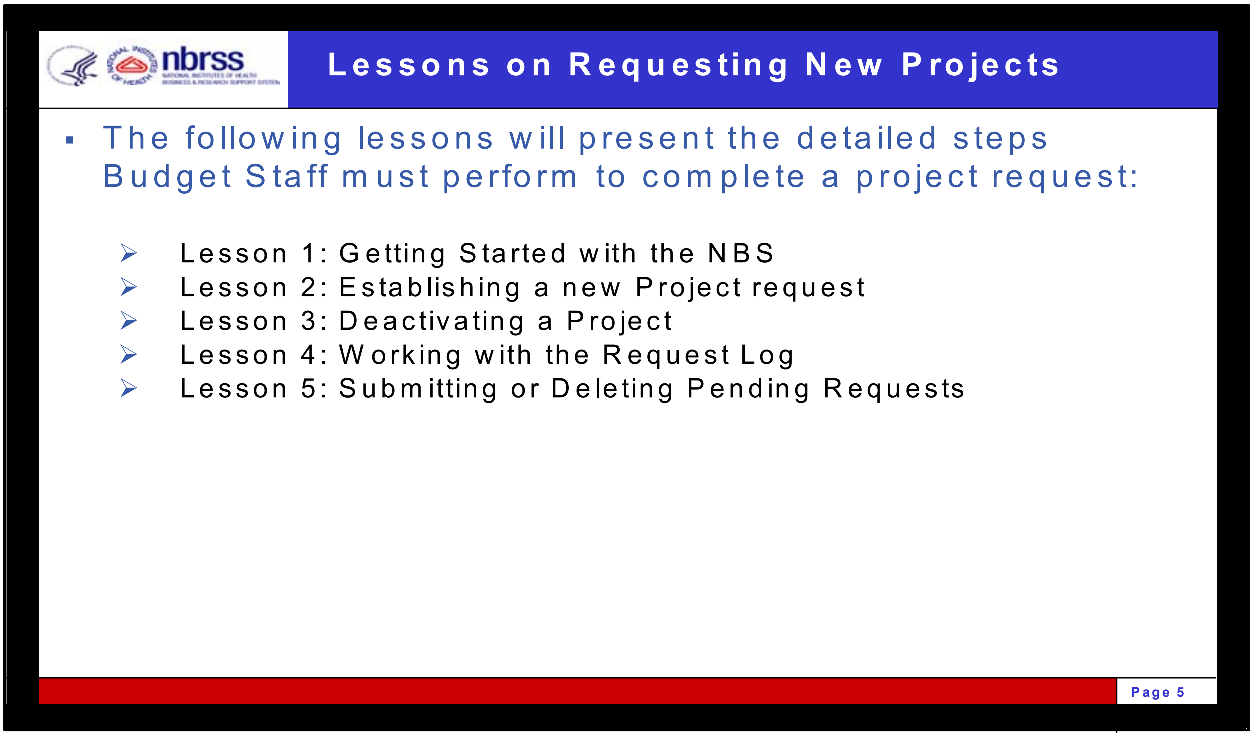
Lessons on Requesting New Projects



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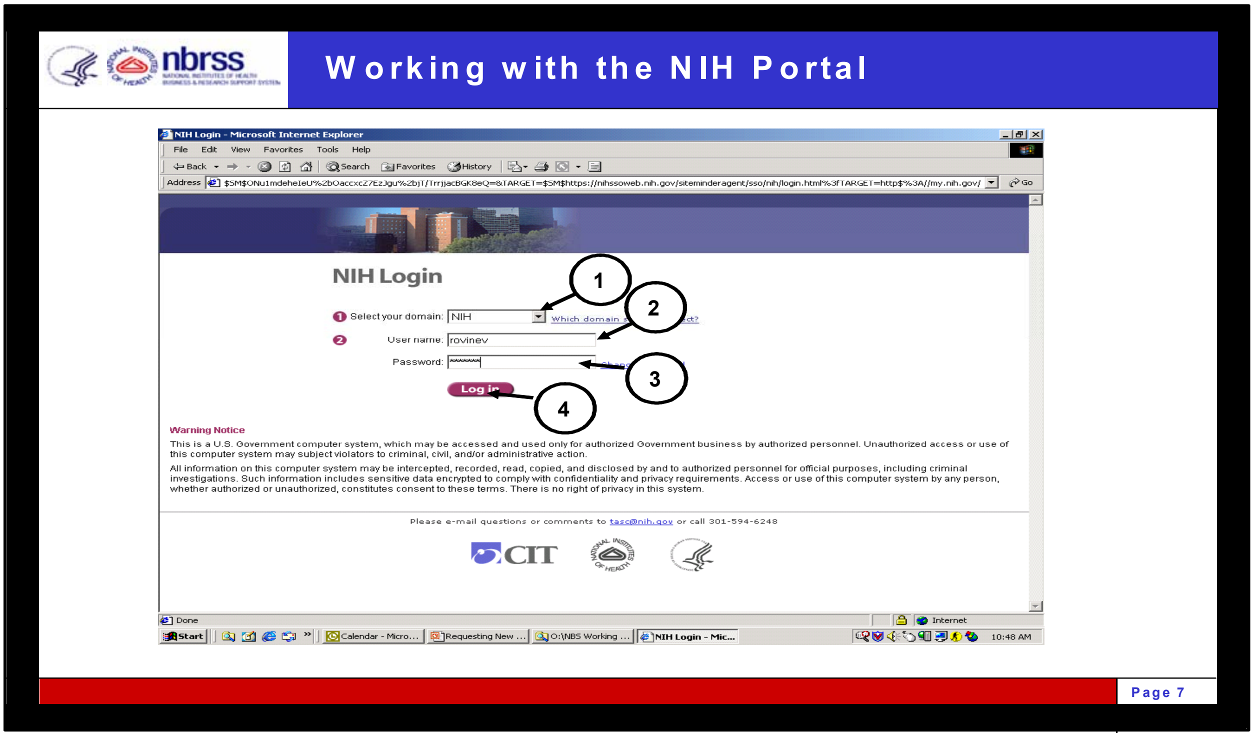

All NBS applications are accessible through the NIH Portal.

To login to the NIH Portal you will need to complete the following steps:

1. Select your NT Domain from the drop down list
2. Enter your User Name
3. Enter your Password
4. Click the Log in button

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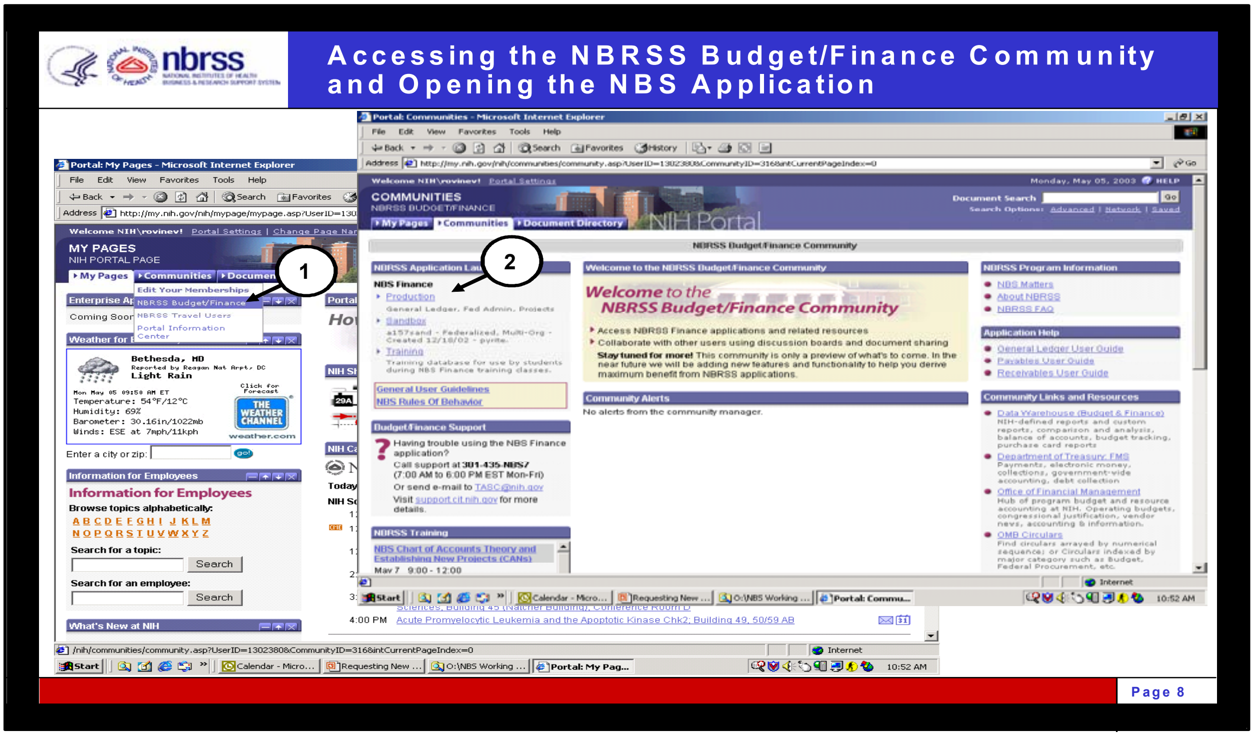
Accessing the NBRSS Budget/Finance Community and Opening the NBS Application



- The NIH Portal is organized by "communities", which are specific functional areas of interest for different groups at NIH. Examples of communities are Travel Planners or NBRSS Budget/Finance.

- To access the NBS Oracle Projects module:

1. Browse to the "NBRSS Budget/Finance" Community Page by clicking on the Communities tab and selecting NBRSS Budget/Finance from the list.

2. Click on the applications link located on the upper left side of the page to access the NBS application. For today's session, you will select the Training link. When you begin to use the system, you will select the Production link.

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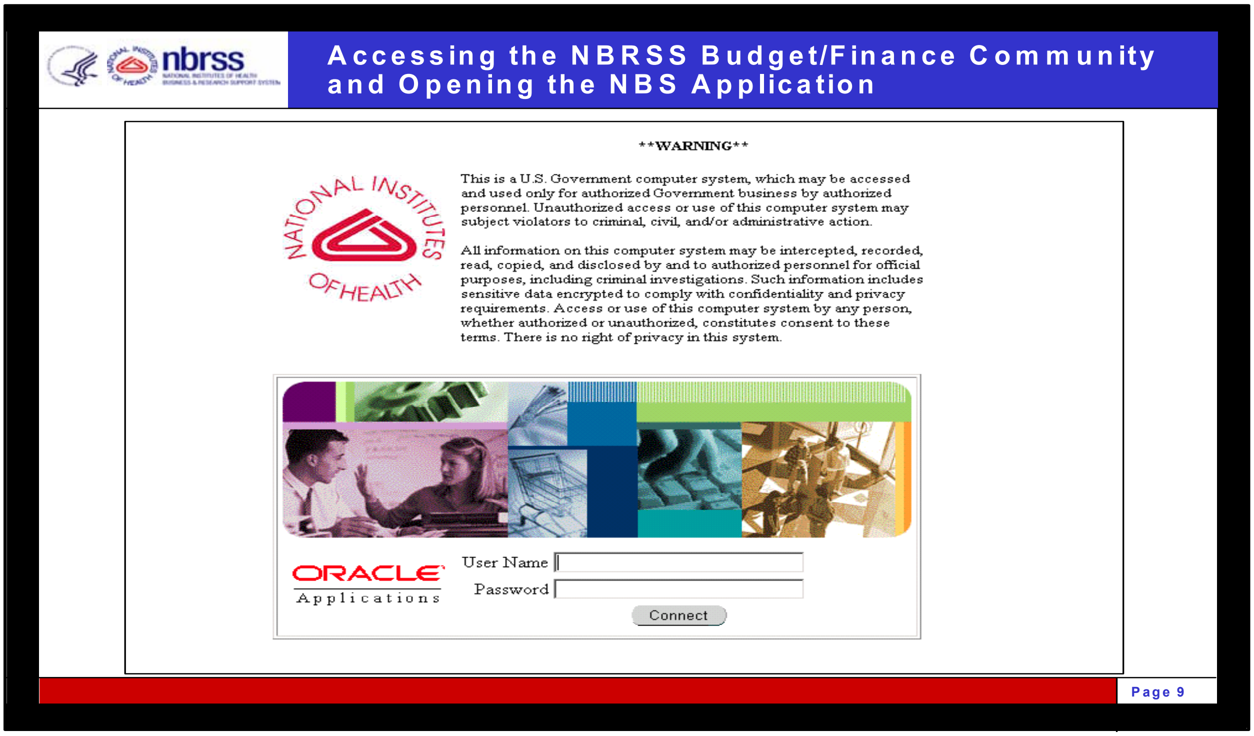
Accessing the NBRSS Budget/Finance Community and Opening the NBS Application



- The Oracle Login window is where you will enter your User Name and password.

- Use the Account Request Form - General Ledger/Federal Administrator to request access to the NBS. You will need to request the NIH IC Project Request User responsibility.

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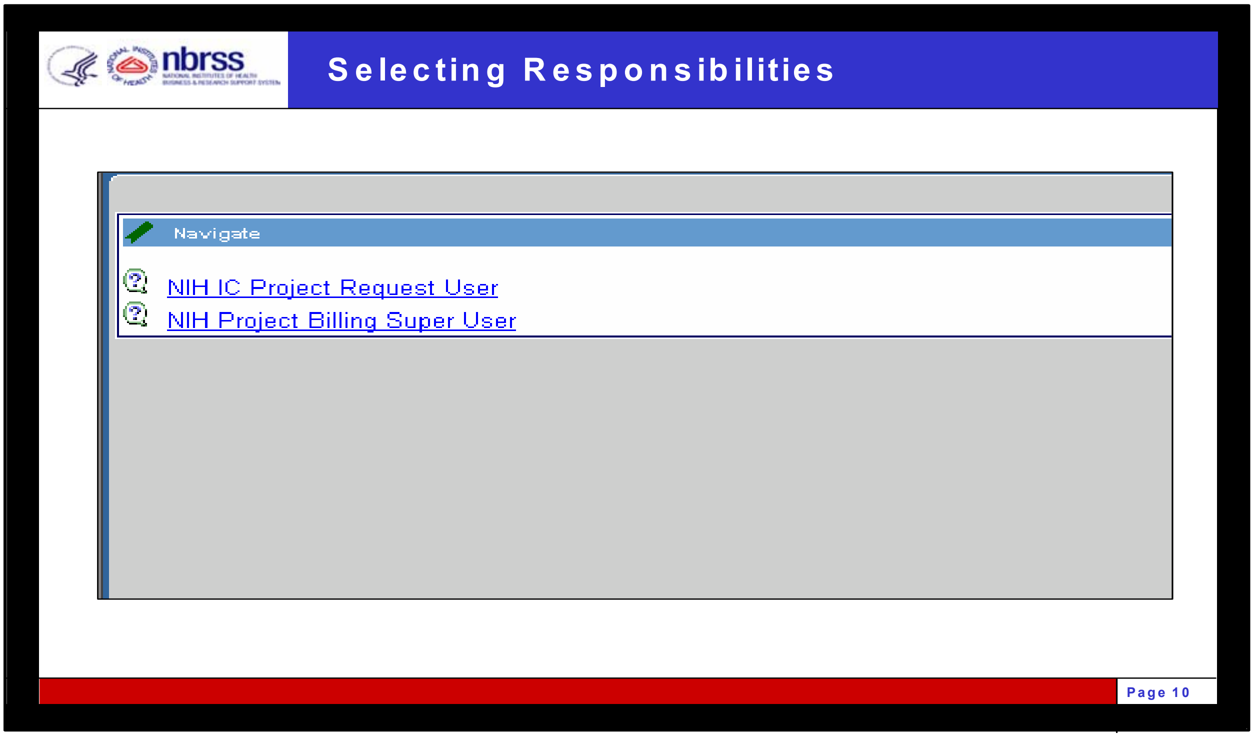
Selecting Responsibilities



- Once you have logged into the NBS, you must select a responsibility.

- A responsibility defines the NBS functions you can perform and the screens and data you can access. If you perform multiple functions within the NBS, you may be assigned multiple responsibilities.

- If you only have one responsibility, you will not see this window and will go directly into the Projects application.

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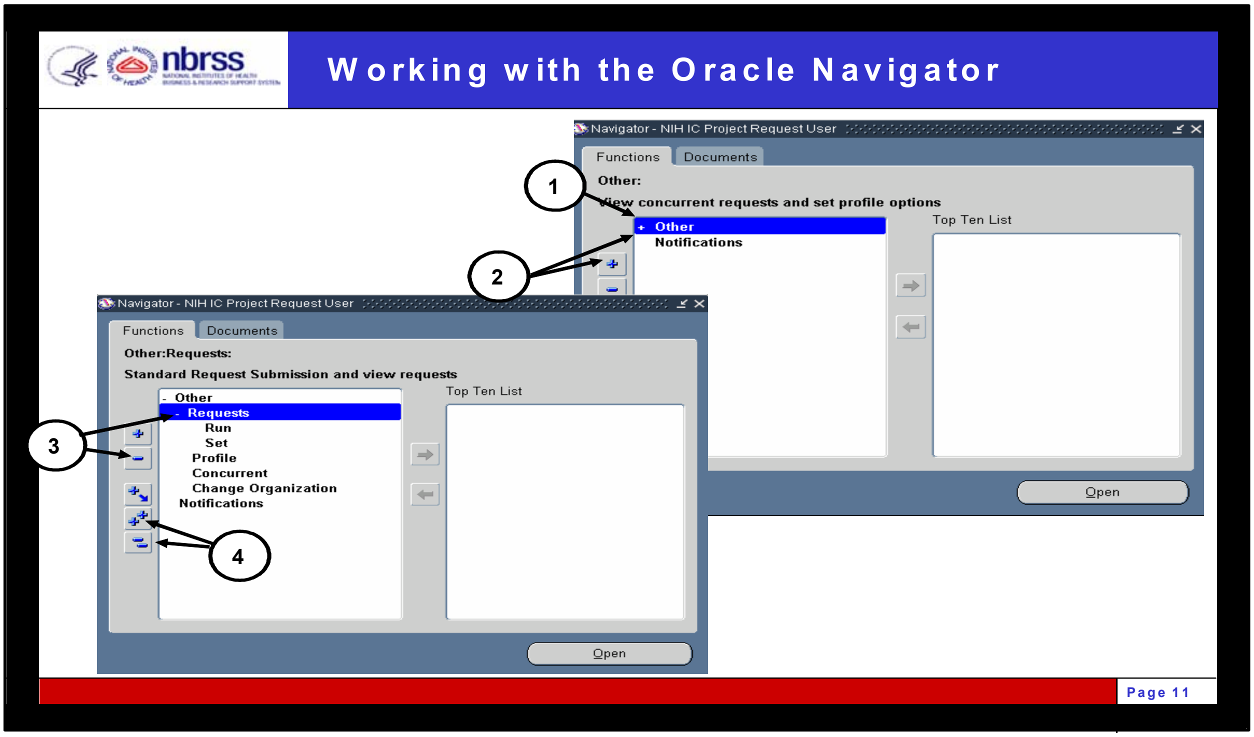

- The Oracle Navigator window lists all of the functions you can perform using the responsibility you selected.

1. Functions are arranged hierarchically within the function window. A plus sign next to a function indicates that there are related subfunctions under the function.

2. To see related subfunctions either double click on the function or single click on the function and then click the plus sign on the left side of the window.

3. To collapse subfunctions either double click on the higher level function or single click on the higher level function and click on the minus sign on the right side of the window.

4. You can expand all functions or collapse all functions by clicking on the multiple plus sign or multiple minus sign.

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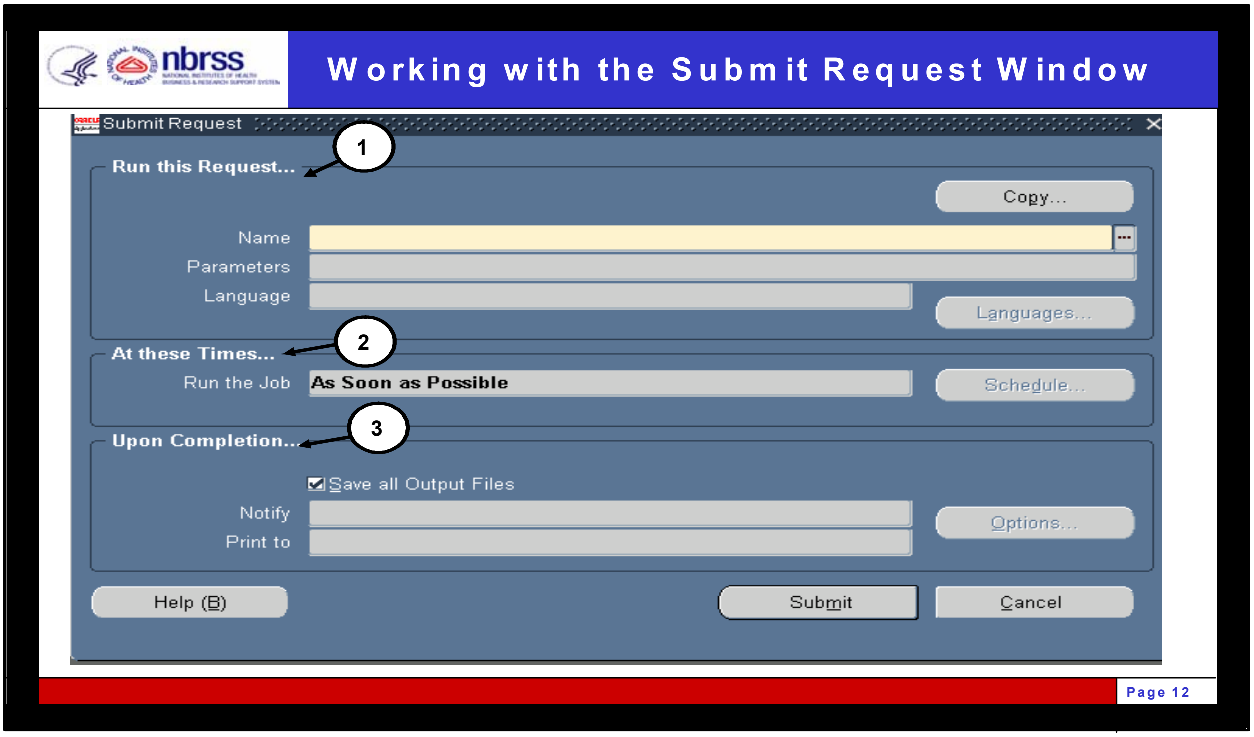
Working with the Submit Request Window



1. The Run this Request section enables you to select requests from a list of values.

2. The At these Times section enables you to schedule the requests to run at a certain time (not recommended for this process).

3. The Upon Completion section enables you to notify others of your request, or print your request.

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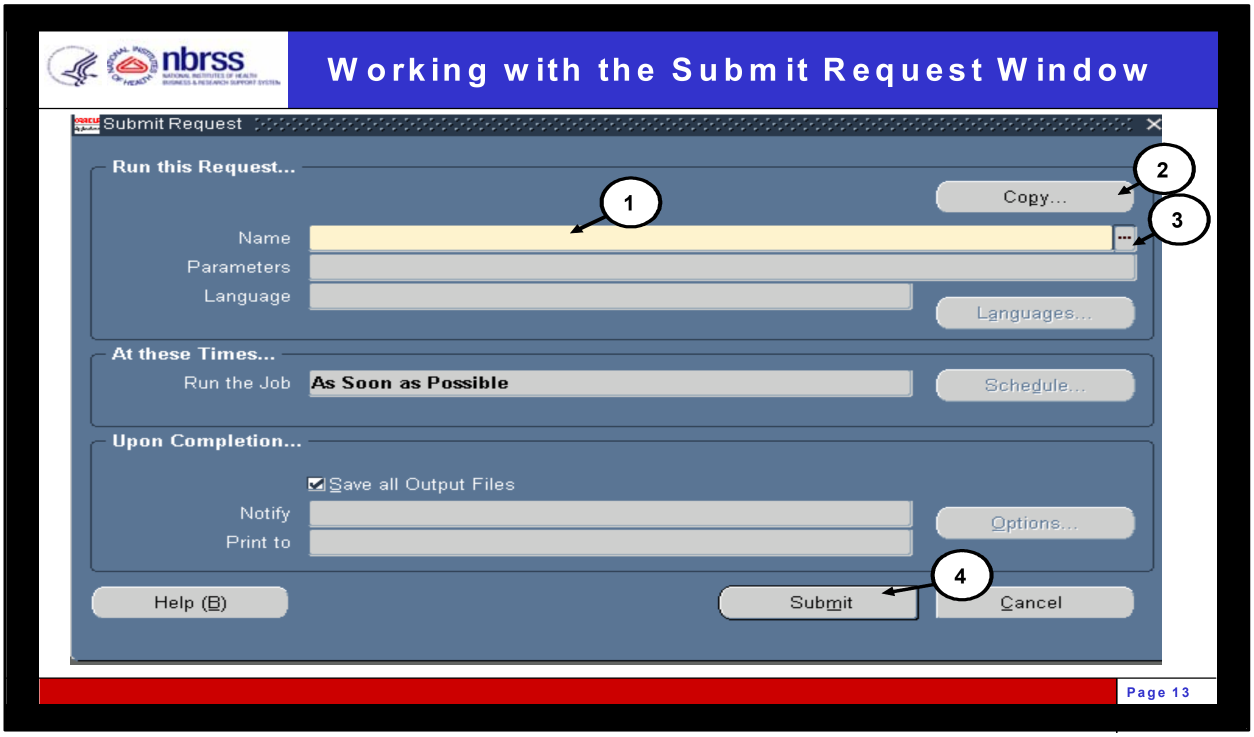
Working with the Submit Request Window



- The **Submit Request** window allows you to pull up and run requests within the NBS.

1. A field with a yellow background indicates that the field is required for data entry.

2. The Copy button enables you to copy a previous request and use it as a starting point for a new request.

3. The ellipses (3 dots) at the end of a field indicate that there is a list of values (LOV) you can use to select a desired value.

4. The Submit button enables you to submit your request for processing.

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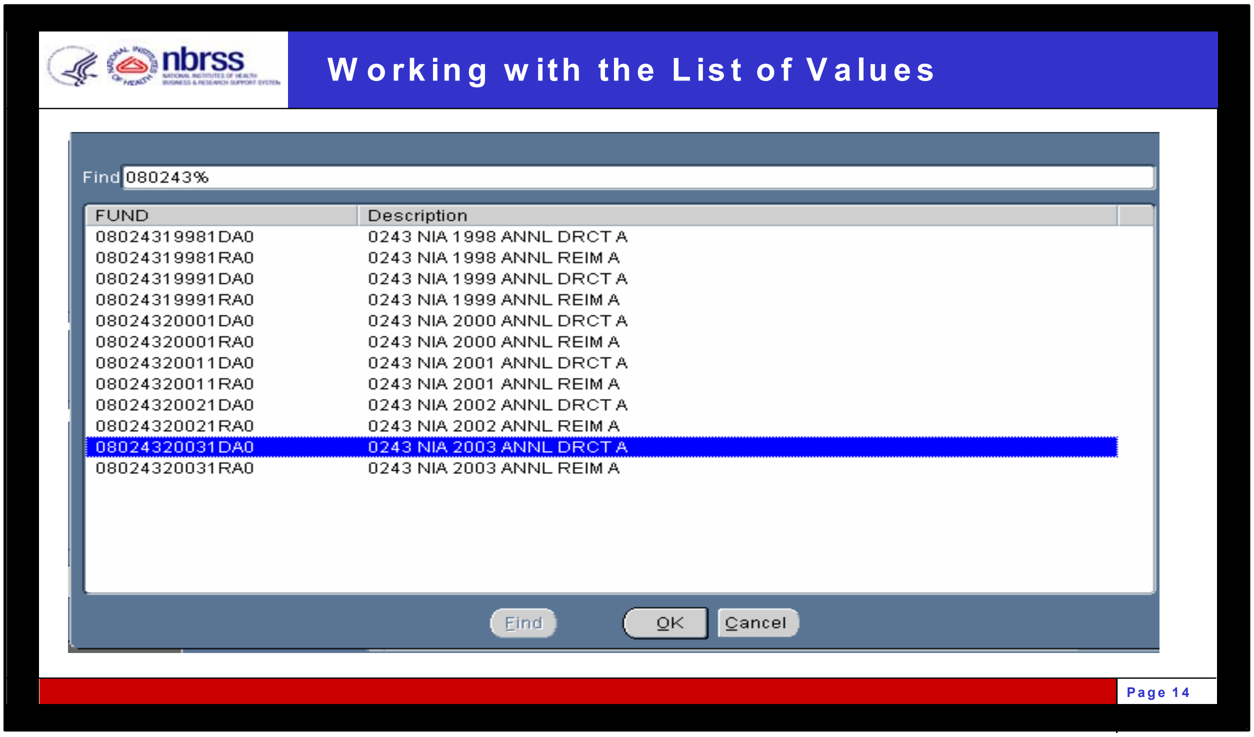

- If you click on a list of values icon, the LOV will appear. You can scroll through this list of values to locate your value, or you can use the Find field to narrow your search.

- The % sign in the Find field is a wildcard that will allow you to perform a partial search in the LOV. The % sign can be used before or after known values that a user is searching for to represent unknown values.

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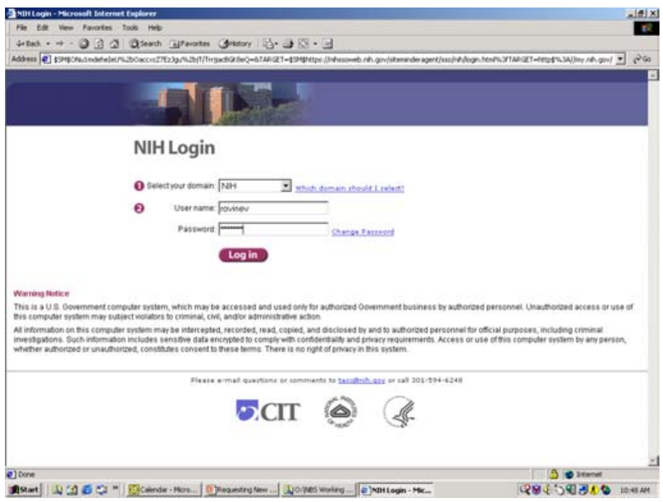
Accessing the NBS Oracle Projects Module

Purpose

The purpose of this document is to describe how to access the NBS Oracle Projects module

NIH IC Project Request User

1. Launch Internet Explorer and type in the following web address: http://my.nih.gov.
2. Select your **NT Domain** from the drop down list and enter your User Name and Password.
3. Click the **Login** button.



4. Select the **NBRSS Budget/Finance** community from the **Communities** drop down menu.

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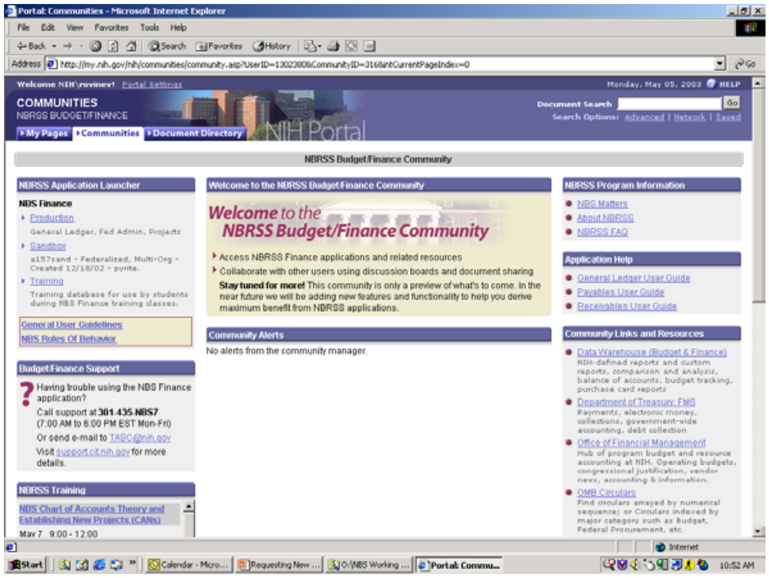
5. From the NBRSS Budget/Finance portal page, click on the **Sandbox** link to perform the classroom exercises.



6. Enter your user name and password and then click on the **Connect** button. For the classroom exercise, use the user name and password provided to you by the instructor.

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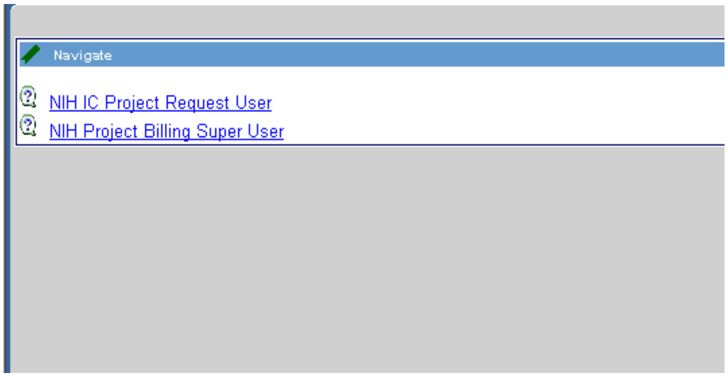
7. Click on the **NIH IC Project Request User** link to select this responsibility. If you only have one responsibility, this responsibility will automatically open.



End of activity

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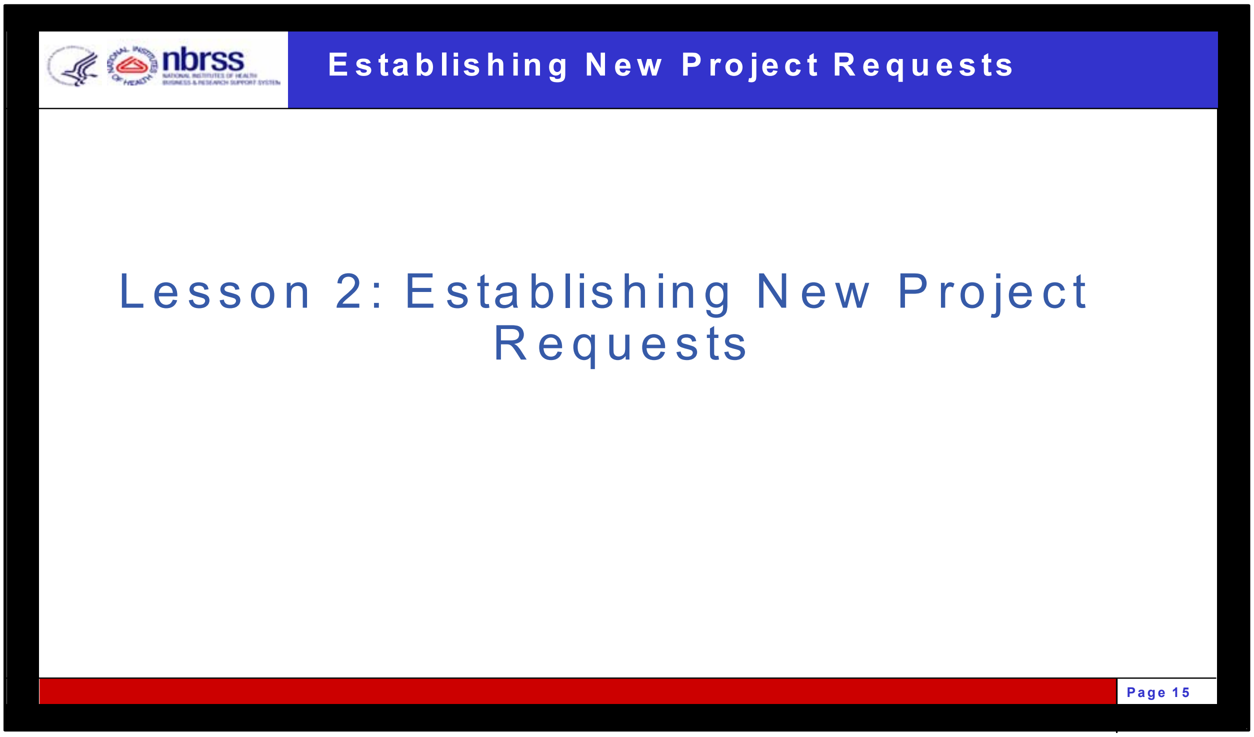

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Lessons on Requesting New Projects

Lessons on Requesting New Projects

- You will need to organize the following information before you can enter a request for a new Project:
  - The Project Description – the name of the new Project
  - The Project Owning Org – The organization within the IC for which spending is tracked*
  - The Project Manager – the Budget Officer
  - The Project Duration Start Date – when will the Project begin incurring obligations
  - The ACS values related to the Project**
  - The MAS Cost Center

*The Project Owning Org MUST have a valid Standard Administrative Code (SAC) or it will not be available for selection
**ACS values for your IC are located in your IC's Budget Entry ADI spreadsheet

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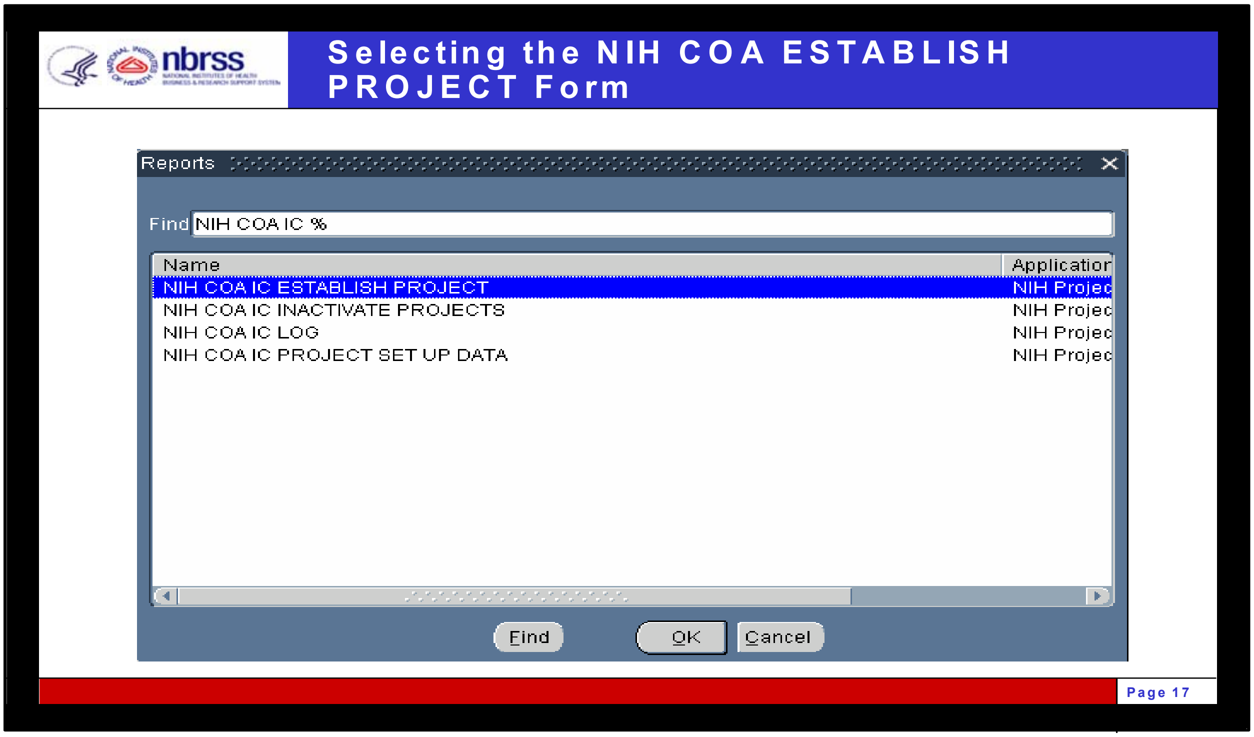
Selecting the NIH COA ESTABLISH PROJECT Form



- There are four types of requests that you can use in Oracle Projects:
  - NIH COA ESTABLISH PROJECT – Used to create new Project requests
  - NIH COA IC INACTIVATE PROJECTS – Used to create deactivation requests
  - NIH COA IC LOG – Used to access a log that tracks the status of a request
  - NIH COA IC PROJECT SET UP DATA – Used to submit or delete pending requests
- To establish a new Project, you will select the first value – NIH COA ESTABLISH PROJECT.

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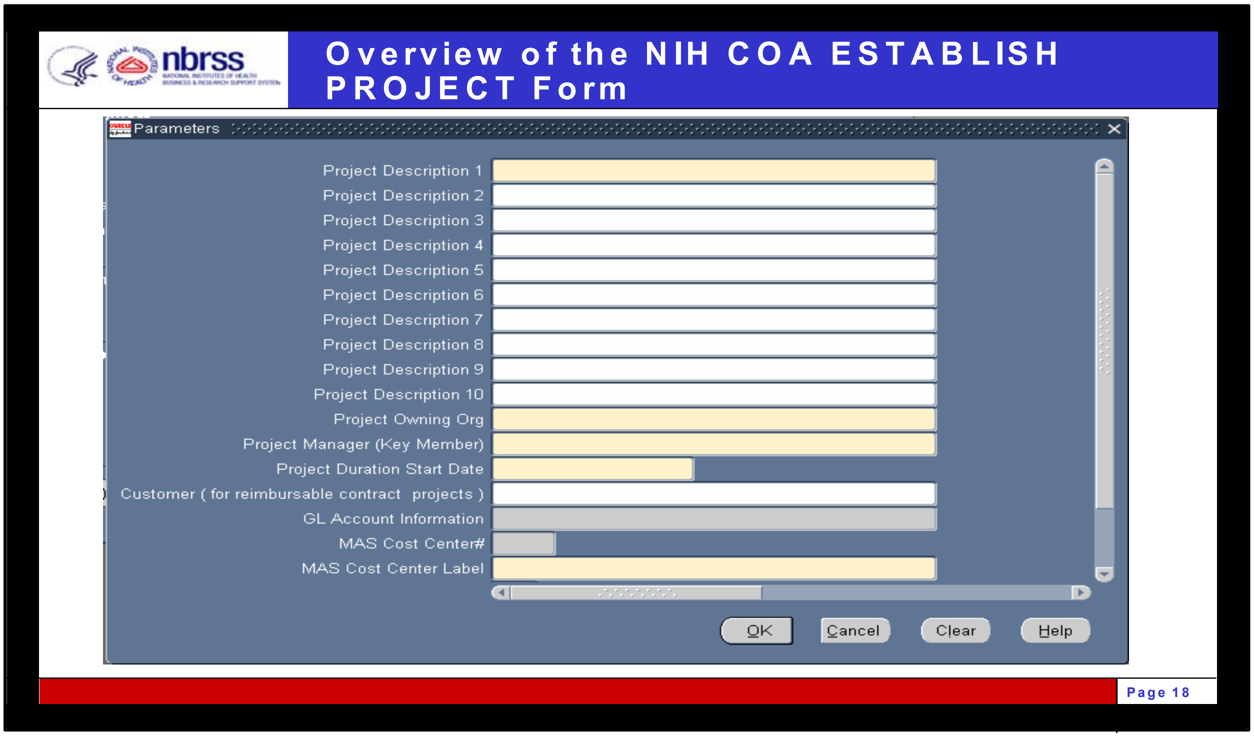
Overview of the NIH COA ESTABLISH PROJECT Form



- When you select the NIH COA IC ESTABLISH PROJECT, the new project request form will appear.

- You will use this project request form to enter information relating to your new project(s). Remember, all fields with yellow backgrounds are required fields.

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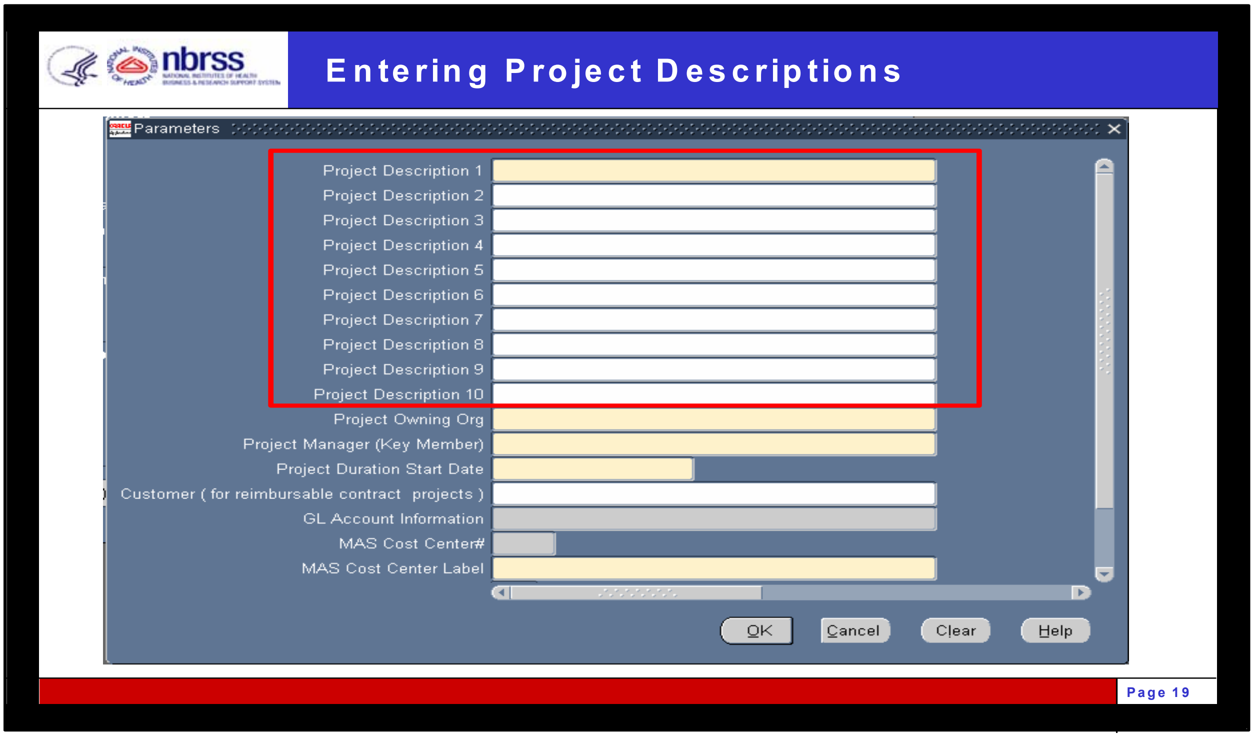
Entering Project Descriptions



- The first step you must take when you setup a new Project request is to enter an informative Project Description.
- The Project Description you enter will also serve as the CAN label in the ADB.
- Behind the scenes, Oracle will assign a six-digit Project Number and a seven-digit CAN to each Project you create. These numbers will be emailed to you when OFM sets up your new Project.
- You must enter at least one Project Description, but may include up to ten if the Operating Budget and other Project attributes are the same.

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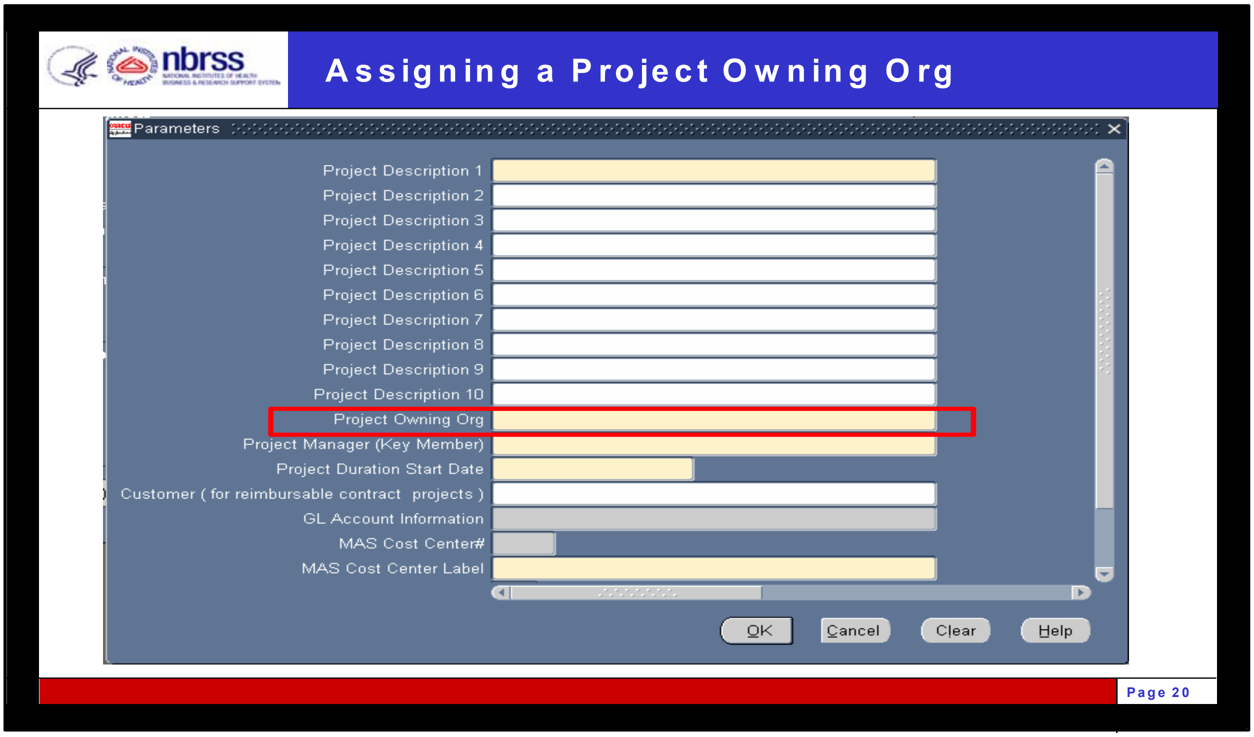
Assigning a Project Owning Org



- The Project Owning Org refers to the organization within the IC that controls a specific Project's (CAN's) spending.

- The Project Owning Org will drive or can filter the information available in drop down menus in other NBS modules.

- The NBS Team recommends , but does not require, that this organization is at a lower level than the Operating Budget Org.

- The Project Owning Org must be a valid Standard Administrative Code (SAC) listed in the LOV for this field.*

*If the SAC value you want to assign is not in the LOV, please review your official structure and consult with your Organization Change Coordinator.

If a new SAC is needed, your IC will need to work with OMA to establish the new value. Once the SAC value has been approved and updated in the HRDB, it will flow through automatically to the NBS.

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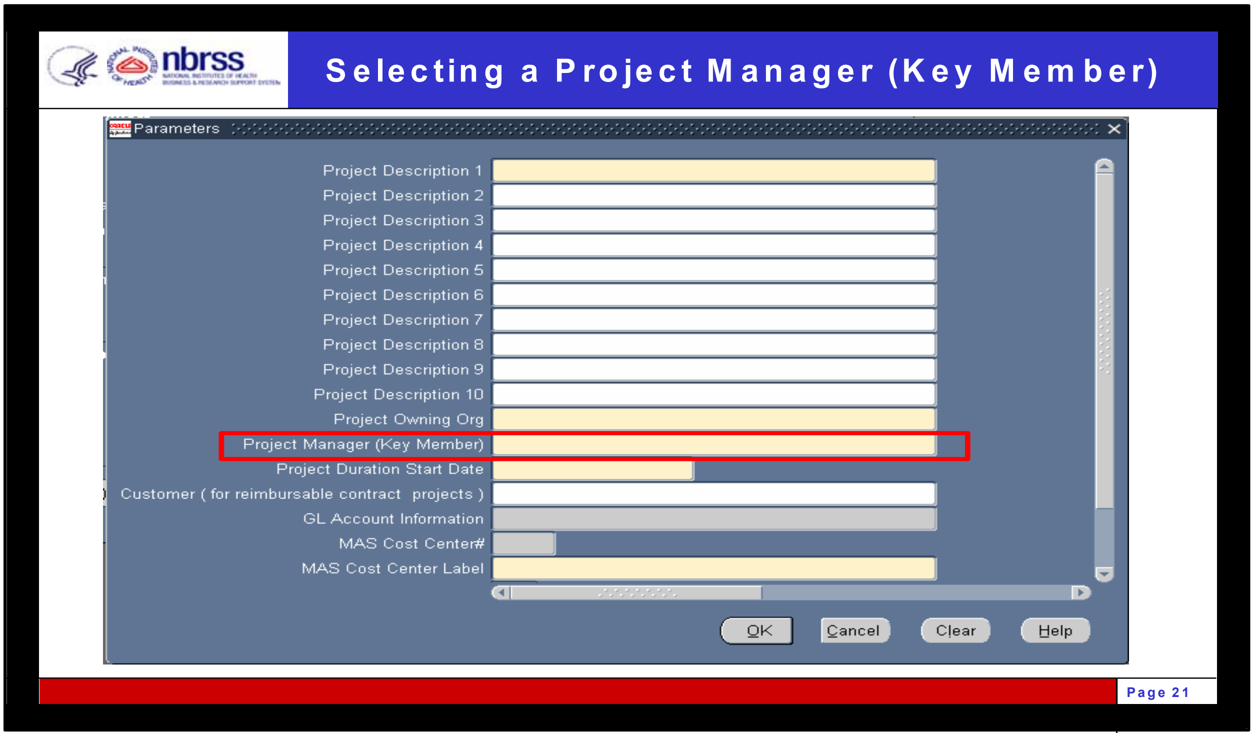
Selecting a Project Manager (Key Member)



- The Project Manager (Key Member) is usually the Budget Officer. You can select the appropriate name from the LOV.

- This value can be changed after Project approval.

- The Project Manager you assign will receive email notifications for each new Project that is set up in the NBS.

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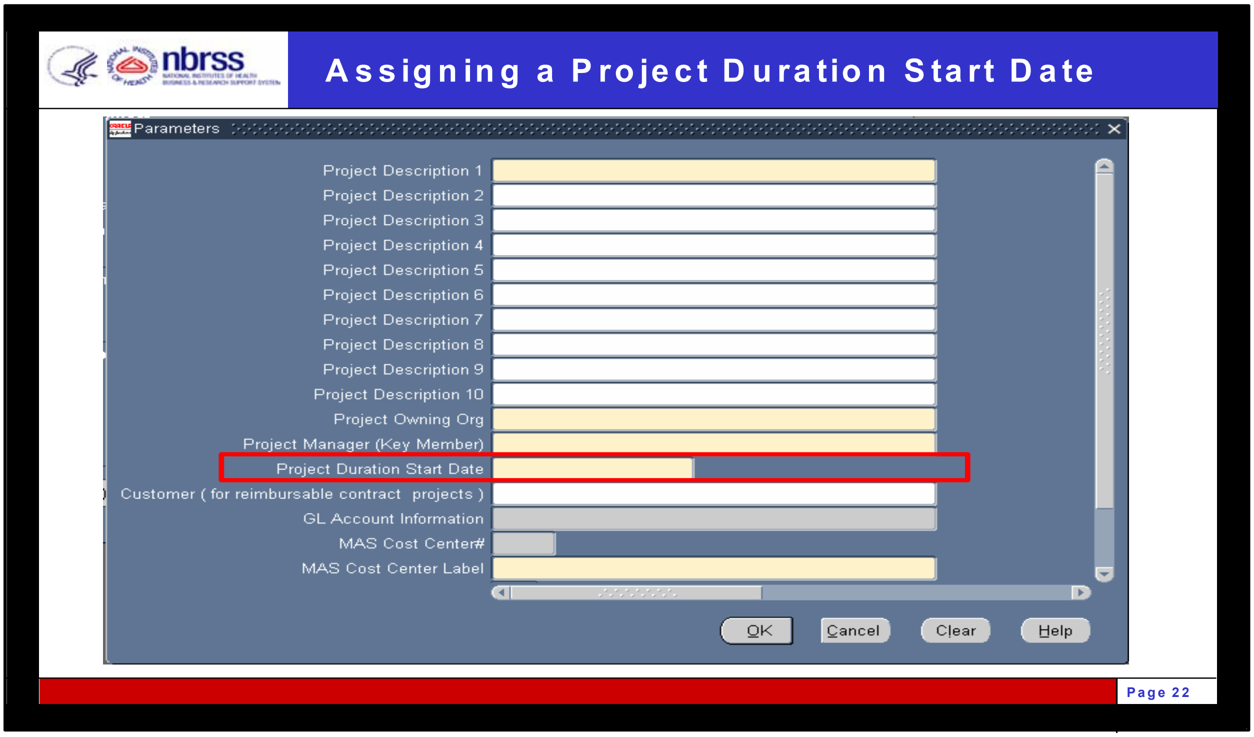
Assigning a Project Duration Start Date



- The format for the Project Duration Start Date must be DD-MMM-YYYY.
- This is the date the Project can begin incurring expenses.
- The value in this field can be future-dated.

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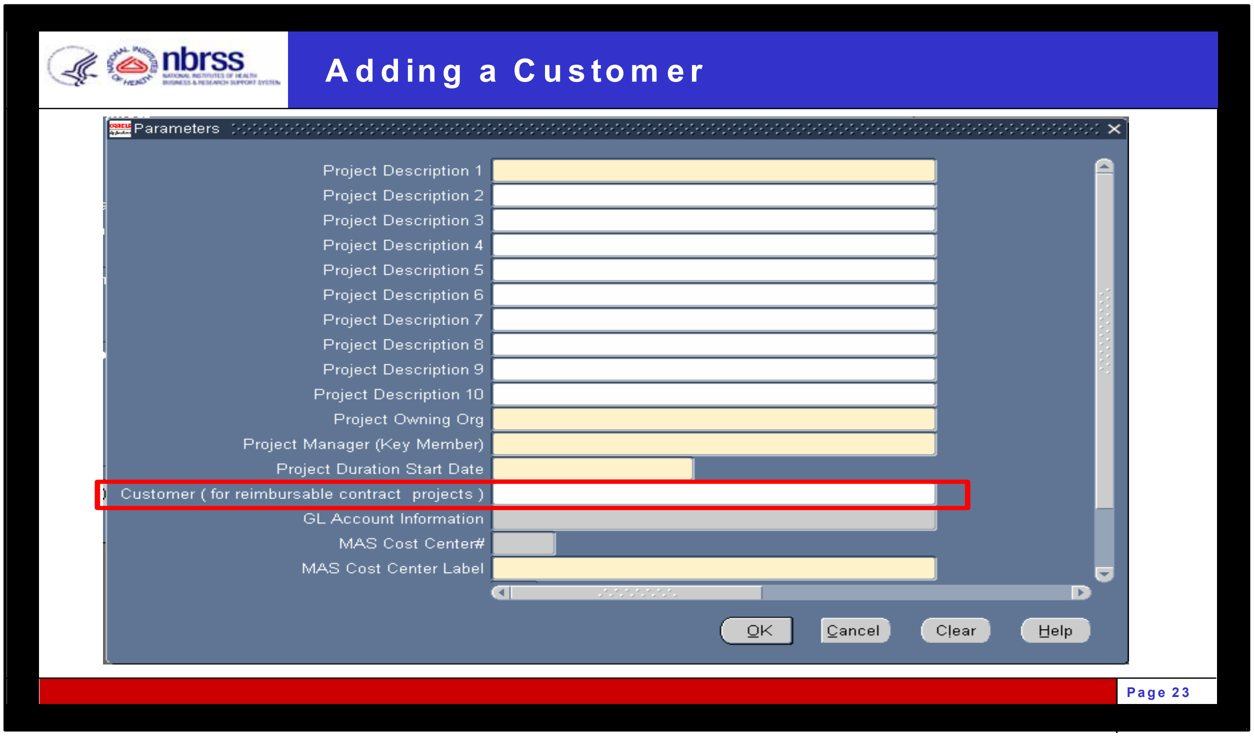
Adding a Customer



- Projects can be Direct or Reimbursable, just like CANs.
- The Customer field is completed only if the project you are requesting is reimbursable.
- If your Project is reimbursable, select the only value that is valid for this field, "Conversion Customer".
- When additional Projects functionality becomes available in future deployments, you may be able to assign specific customers to a Project.

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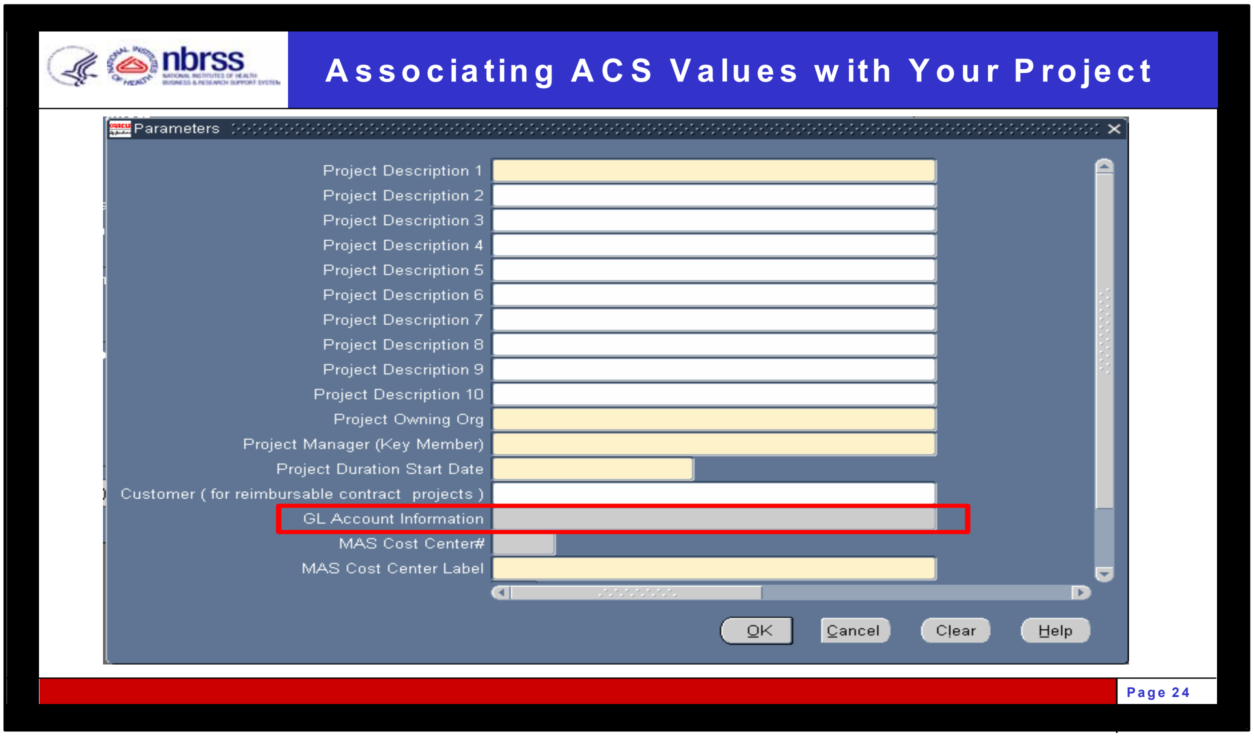
Associating ACS Values with Your Project



- The GL Account Information field enables you to associate ACS values with your Project.

- When you click inside this field, it launches the Accounting Flexfield window, which displays your ACS fields.

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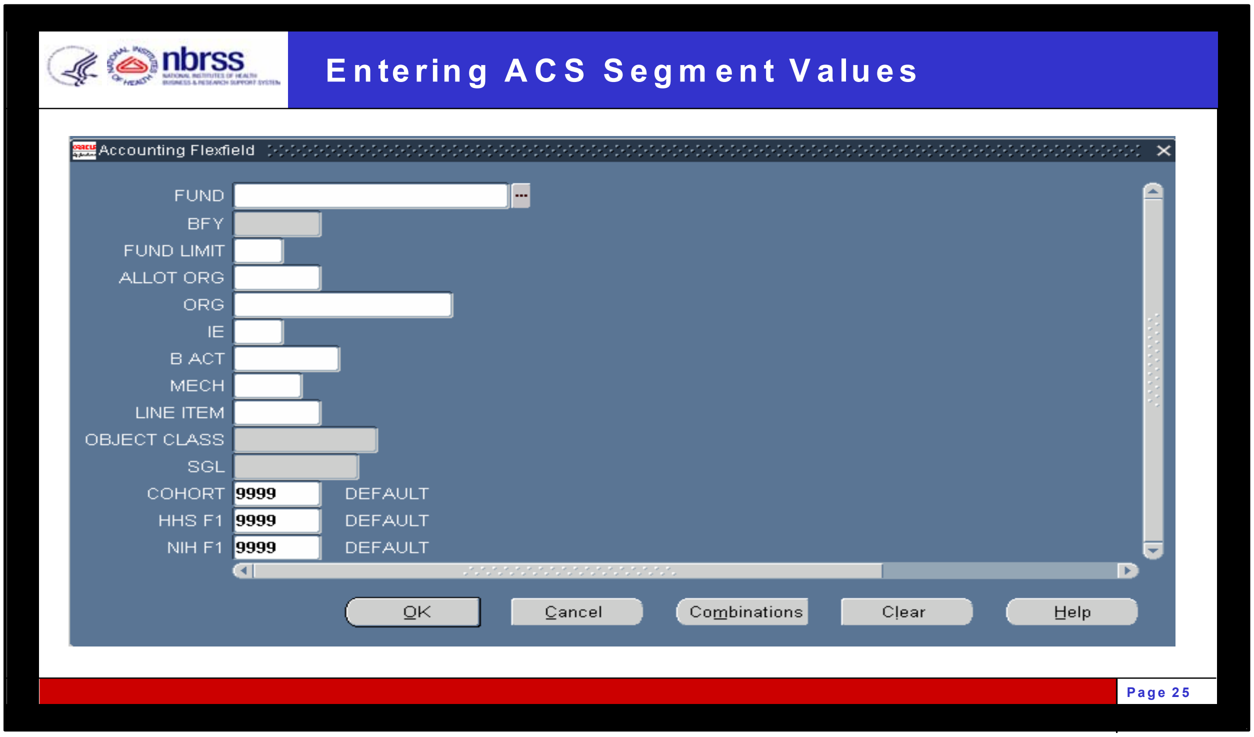
Entering ACS Segment Values



- You will need to enter the ACS segment values associated with your project so OFM will know which segment values to assign to your new project.

- You can type the segment values directly into each field, or you can use the LOV to select values for each field. It is recommended that you use the LOV to increase accuracy.

- The values you enter/select must be valid segment values defined in the NBS. The system will not allow you to proceed if you enter a value that does not exist for a particular segment.

- If you do not have a specific value for the Line Item segment in your ADI sheet, select the default value, which will be a series of "9s".

- You will not enter values for the grayed out fields.

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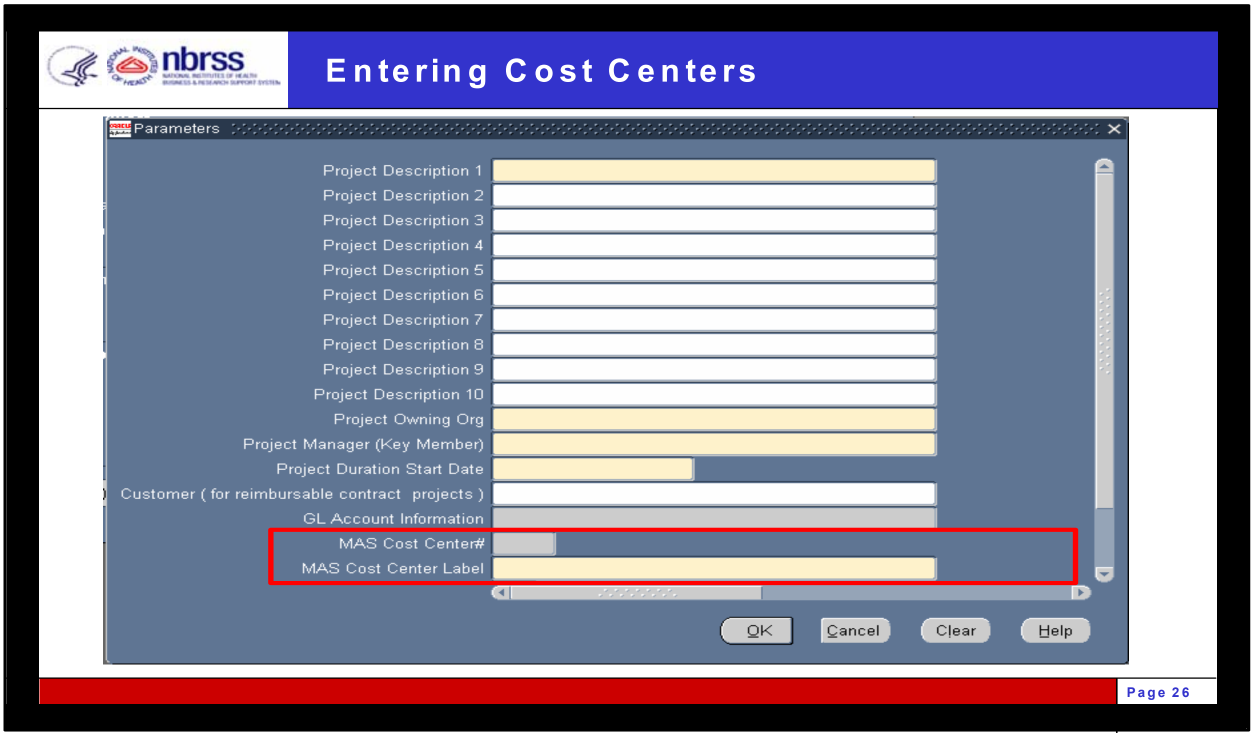
Entering Cost Centers



- If you are adding the new Project to an existing Cost Center, simply enter the number of the Cost Center in the MAS Cost Center # field. The Cost Center label will automatically populate.
- If you want to establish a new Cost Center, you cannot enter a new value directly into the MAS Cost Center # field. You must type the desired Cost Center label into the MAS Cost Center Label field. Any new Cost Centers you establish will appear in the Table 19 Report.
- If you want a specific Cost Center Number for your new Cost Center, enter the desired number into the Comments field.
- You cannot update an existing Cost Center Label using this form. You will need to work with OFM staff if you want to change a Cost Center Label.
- You cannot move Projects (CANs) from one Cost Center to another, you will have to continue the legacy practice of inactivating the existing Projects and creating new ones using the new Cost Center value.

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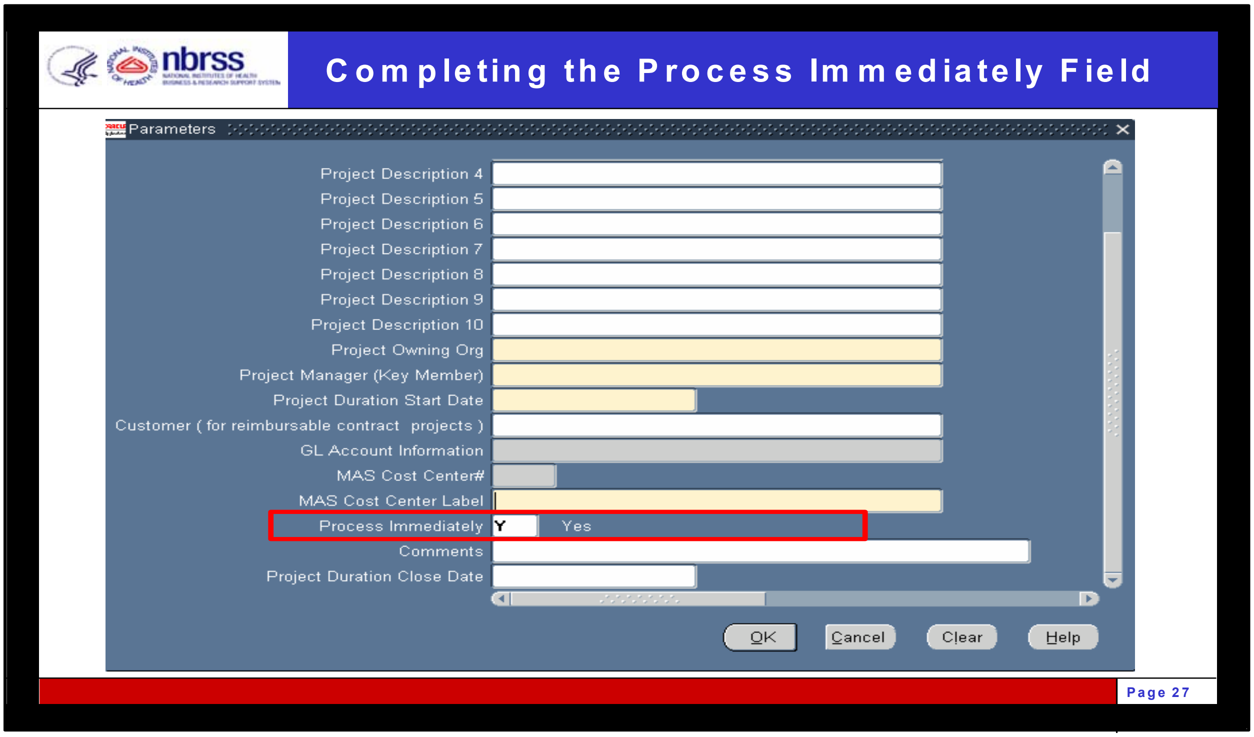
Completing the Process Immediately Field



- You will also need to fill in the Process Immediately field.
- If you enter "Y" for Yes, the system will automatically forward your request to OFM.
- If you enter "N" for No, your request will go into a "pending" status and will require a separate step to submit the request to OFM. You may want to use this option when you are undertaking a major reorganization.

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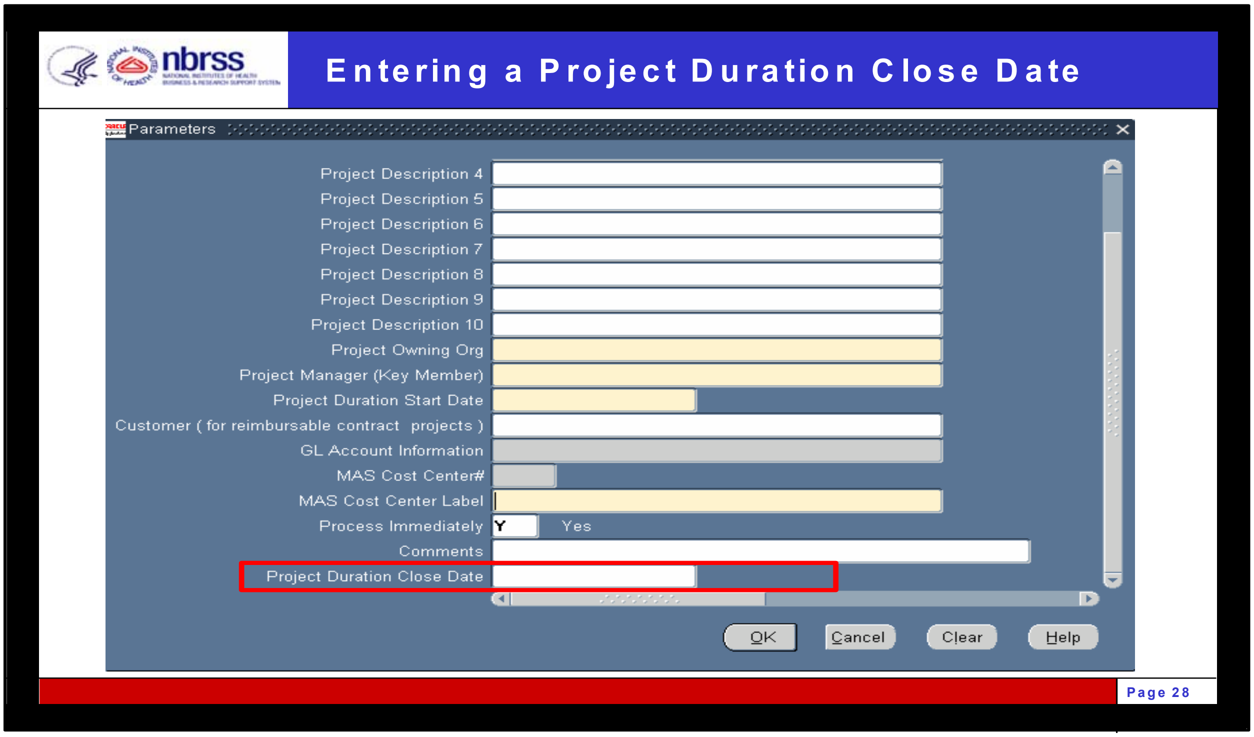
Entering a Project Duration Close Date



- Certain Project accounts, such as Royalties, have specific end dates. The duration of these accounts can be identified at setup by completing the Project Duration Close Date field.

- **For most Project requests, this field should be left blank.**

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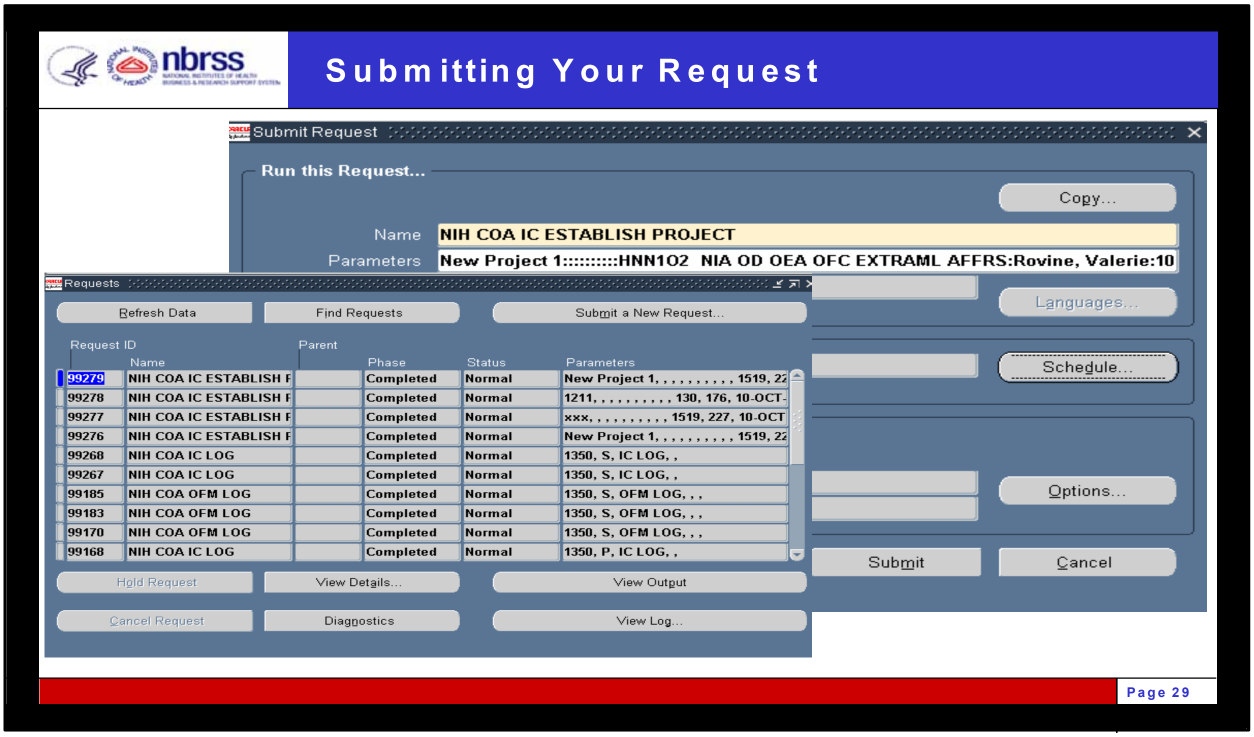
Submitting Your Request



- Once you have entered all the fields for your new Project, you can submit your request by clicking on the **Submit** button.
- If you selected process immediately, your request will go directly to OFM for setup when you click the Submit button.
- If you do not select process immediately, your request will be placed on pending status until further review and final submission.
- After you submit your Project request, the Requests screen will appear, displaying your request ID and the phase and status of your request.

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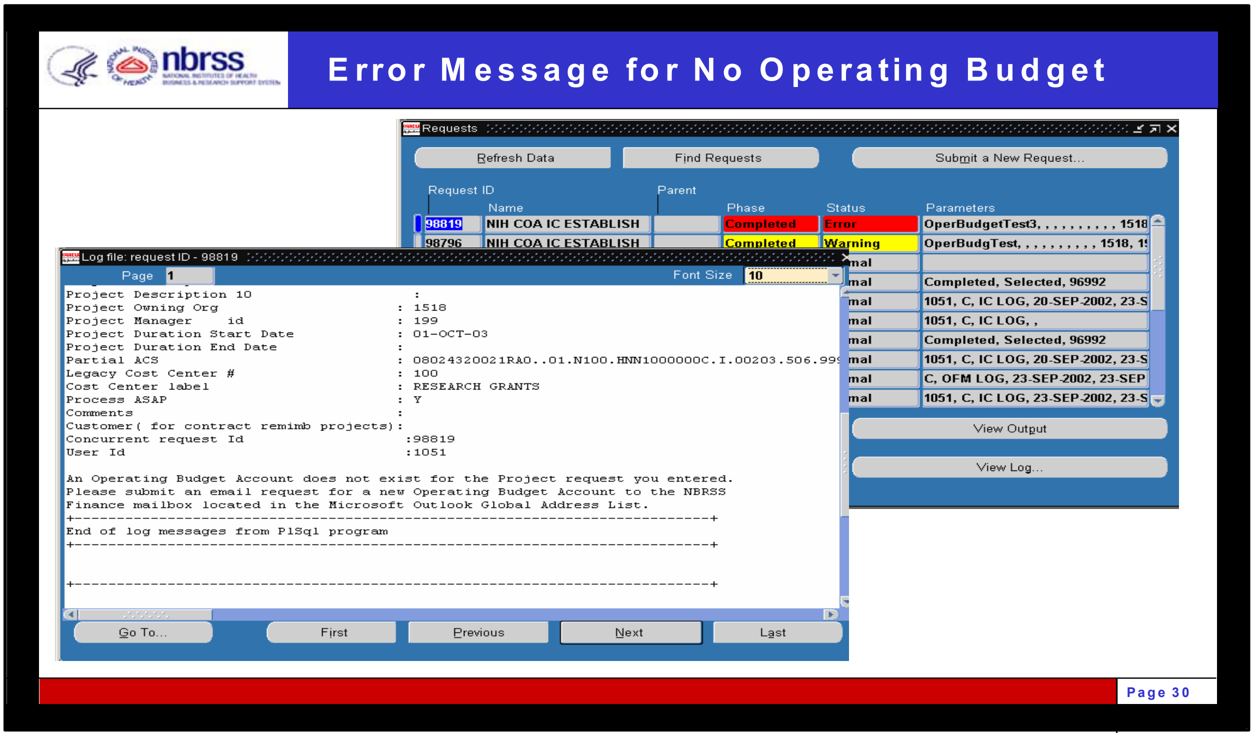
Error Message for No Operating Budget



- If you enter a request for a Project that does not have an Operating Budget Account established, you will receive an error message when you submit your request. This message is displayed in red, with a status of “Error”, as shown.

- If you receive this error message, click on the **View Log** button, and follow the instructions listed at the bottom of the report to request a new Operating Budget Account. Consult your ADI sheet for a list of valid Operating Budget Accounts.

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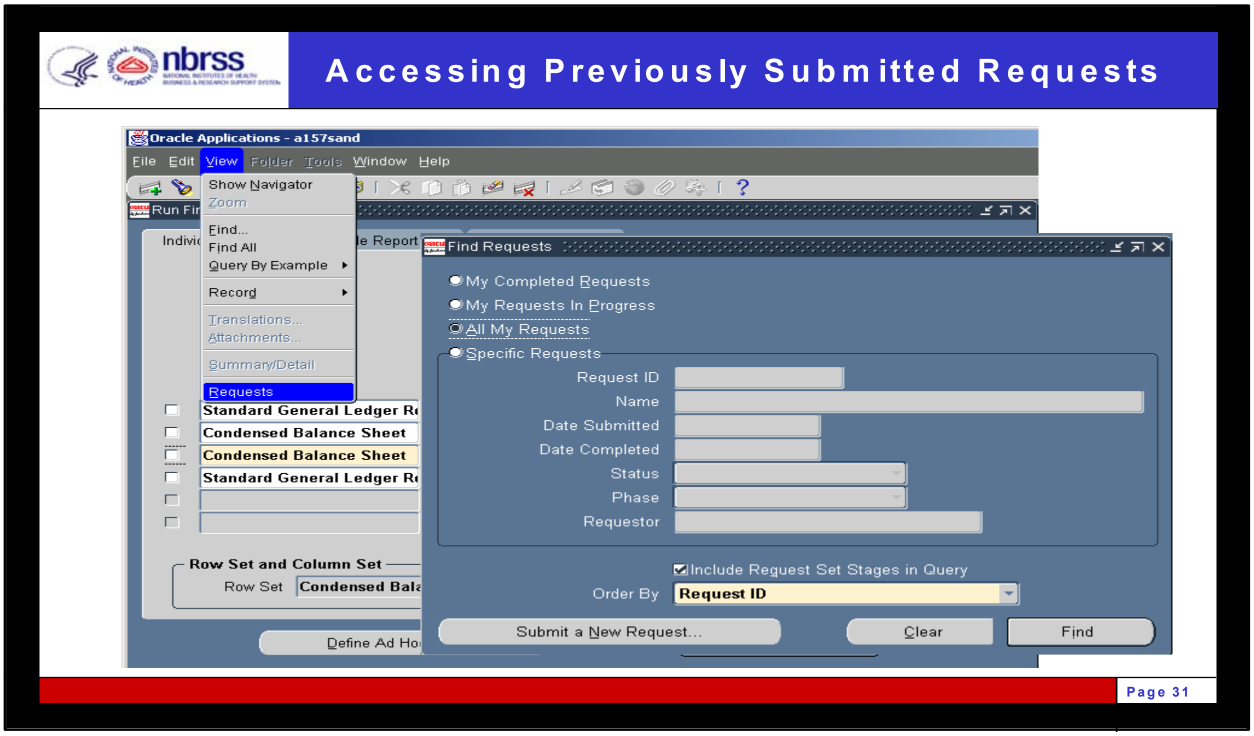
Accessing Previously Submitted Requests



- To view previously submitted requests, click on the **View** pull down menu and select **Requests**.

- When the Find Request window appears, leave the default values, and click on the **Find** button.

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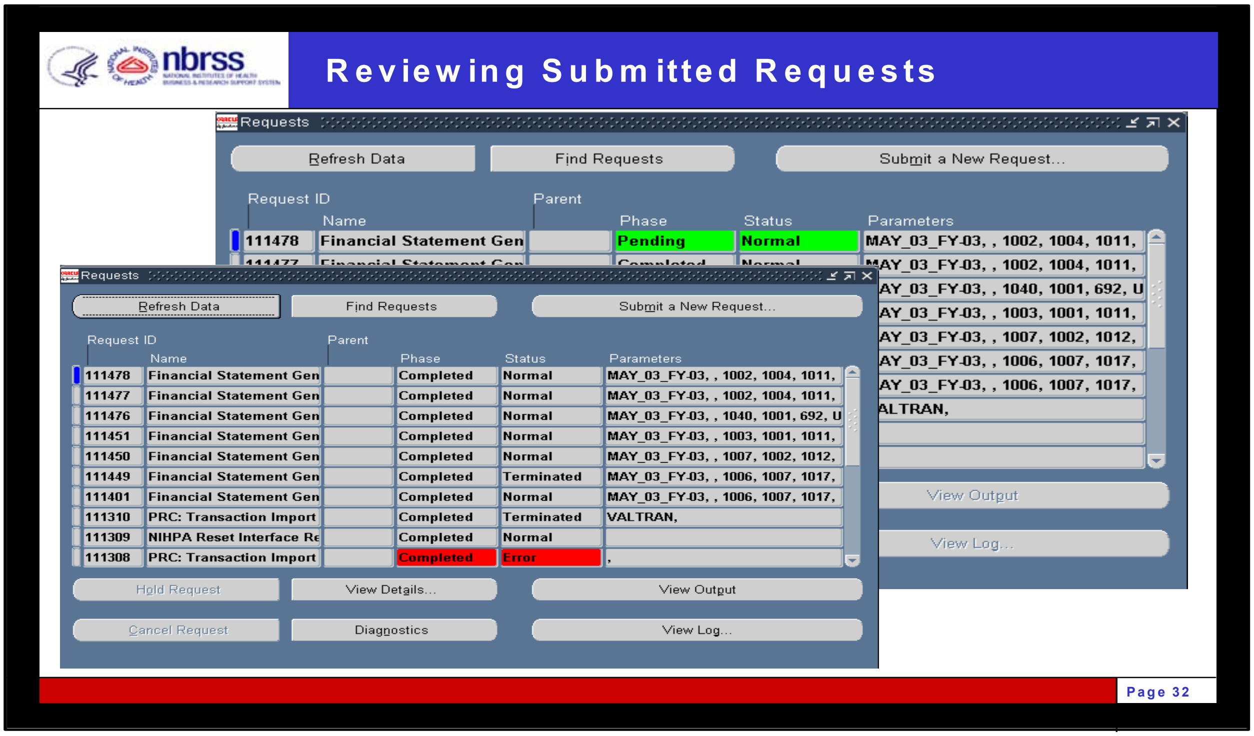
Reviewing Submitted Requests



- The last request you submitted will appear at the top of the request list. A request is selected when the first field of the request is hi-lighted in blue.

- Click on the **View Log** button to open your request.

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Establishing New Projects

NIH IC Project Request User

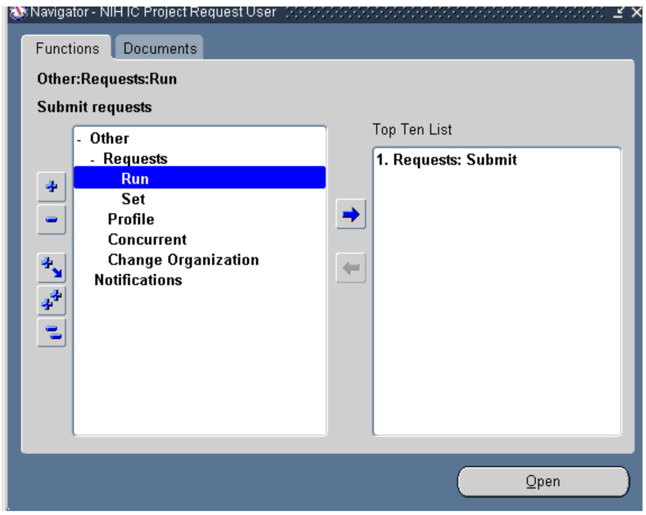
N>Other>Requests>Run

Submit a New Request

1. From the Oracle Navigator, double click on the **Other** function.

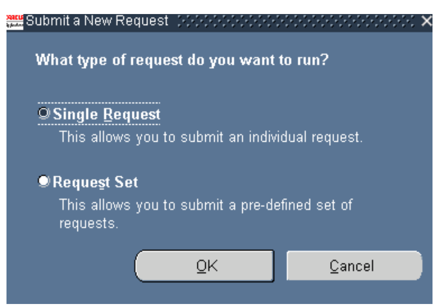
2. Double click on the **Requests** Function.

3. Double click on the **Run** function or highlight the **Run** function and click the **OK** button.



Result: The **Submit a New Request** pop-up window is displayed.

4. Select **Single Request** and click on the **OK** button.



Result: The **Submit Request** window will appear.

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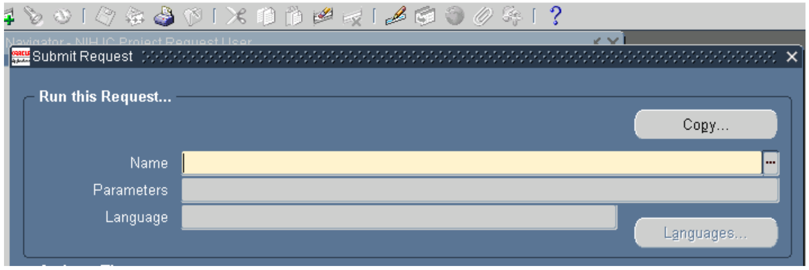
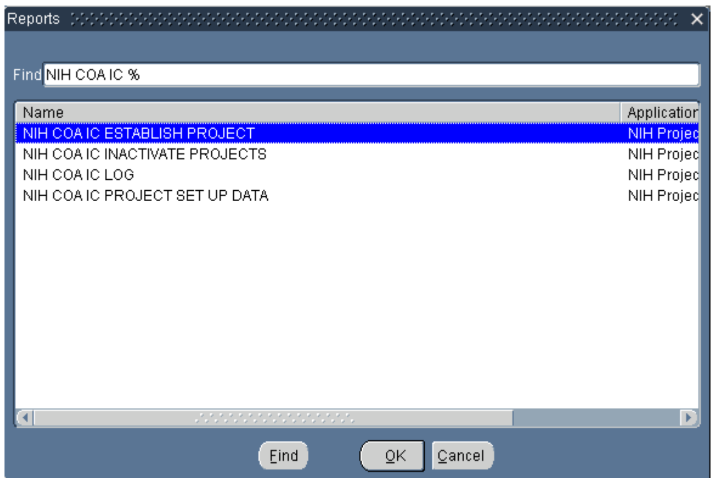


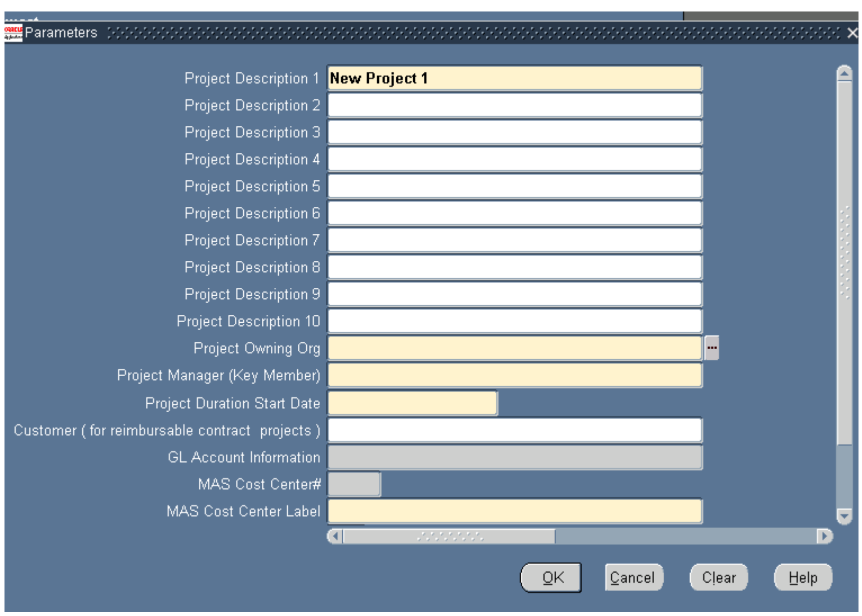
5. In the **Name** field, click on the **List of Values (LOV) icon**.

Result: The List of Values will appear.



6. From the LOV, select the **NIH COA IC ESTABLISH PROJECT** value and click the **OK** button.

Result: The NIH COA IC ESTABLISH PROJECT **Parameters** window will appear.



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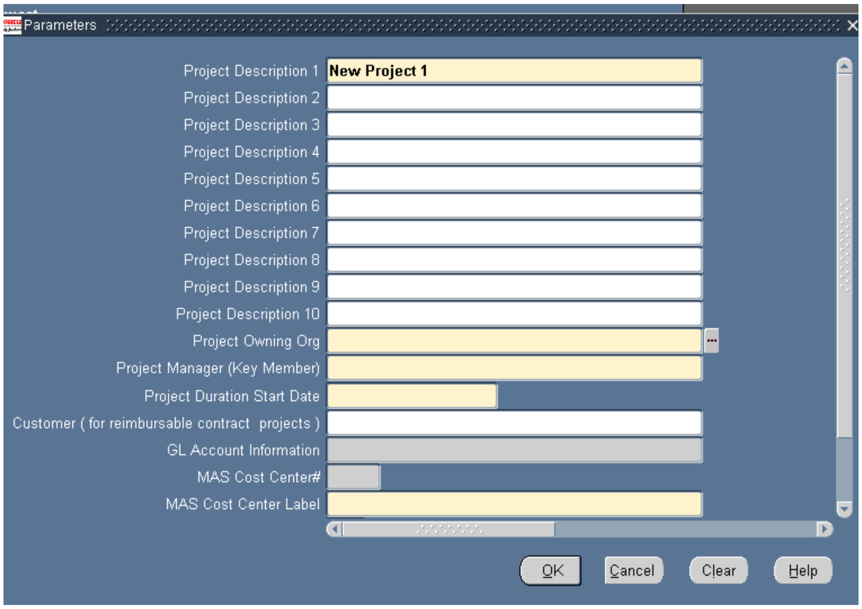
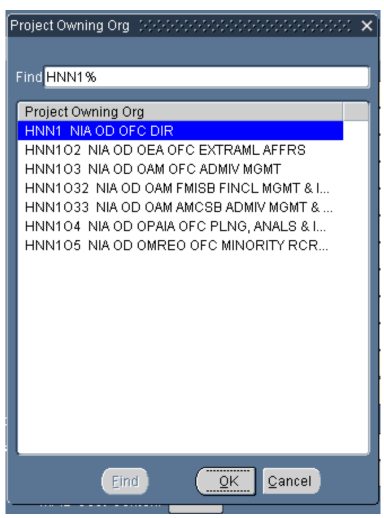
7. Enter a description for your new project in the Project Description 1 field. You may enter up to nine additional new projects if they are all associated with the same Operating Budget.

8. Click inside the Project Owning Org field, and then click the LOV next to this field.



Result: The LOV for Project Owning Org will appear.

9. Click inside the Find field and type all or part of the SAC related to the org you are assigning, followed by a % as shown, and then click the Find button



Result: All values beginning with HNN1 will appear in the LOV.

10. Select the SAC you want to use for the Project Owning Org and click on the OK button

Result: This value will appear in the Project Owning Org field.

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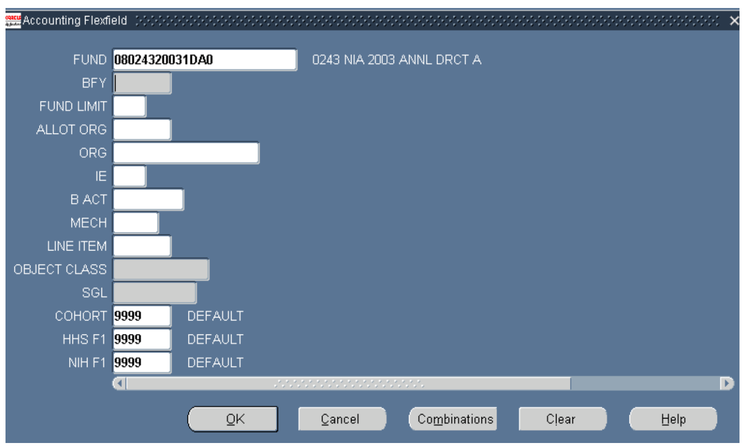
11. Complete the following additional fields on the form by using the LOV or typing the values into the fields:

Field	Description
Project Manager	Person who is fiscally responsible for the Project, most likely the Budget Officer. The Project Manager will receive an email notification when the project is complete
Project Duration Start Date	The date the project should be available for obligations
Customer	Direct Projects do not have customers. Reimbursable Projects will in the future. For now, enter "Conversion Customer" for all Reimbursable Projects only.

12. Click inside the **GL Account Information** field

<u>Result:</u> The Accounting Flexfield window will appear, displaying all of the ACS value fields.



13. Complete the following ACS fields:

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Field	Description
Fund	14 character code that identifies the OpDiv (NIH), the IMN, the Appropriation Fiscal Year, whether the fund is Direct or Reimbursable and Category A or Category B
Fund Limit	Defines whether the Allotment relates to any special law or program (Small Business, Superfund, etc.)
Allotment Org	Identifies the IC to whom an Allotment is issued
Org	Represents the organizational unit within the IC to whom the Operating Budget is issued
IE	Indicates whether the use of funds is internal by NIH or external by the research community
Budget Activity	Identifies an area of research to which the funds are applied
Mechanism	Identifies the research mechanism to which the funds are applied
Line Item	Catch all segment that uniquely identifies the Operating Budget if all other segment values are the same
Cohort	Not currently used - leave the default of 9999
HHSF1	Not currently used - leave the default of 9999
NIHF1	Not currently used - leave the default of 9999

14. Click the **OK** button when you are finished entering the segment values.

Result: You will return to the NIH COA IC ESTABLISH PROJECT FORM.

15. Enter the MAS Cost Center for the new Project.

16. Leave the default value of "Y" in the Process Immediately field if you want your request to go directly to OFM for process. If you do not want your request to be processed immediately, change the value to "N" for No.

17. Enter any comments for OFM into the Comments field.

18. Leave the Project Duration Close Date field blank

19. Click on the OK button to close the NIH COA IC ESTABLISH PROJECT FORM.

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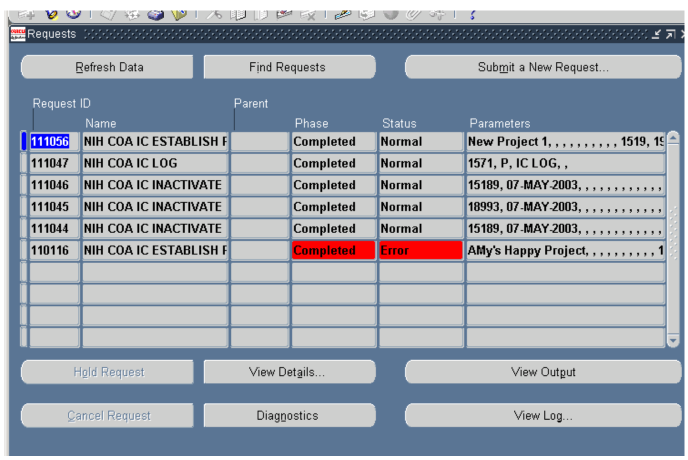
Result: You will return to the Submit Request window.

20. Click on the **Submit** button to submit your new project request.

Result: The Request window will appear, listing your latest request at the top. You may want to make a note of the request number for tracking purposes.



21. Click on the **Refresh Data** button until the Phase value for the request changes to completed.

Result: Your project will be submitted to OFM if you answered "Yes" to Process Immediately. You and the Project Manager will receive an email notification or a notification through Oracle once your new project is established by OFM. If you answered "No" to Process Immediately, you will need to submit your request as a separate step.

End of activity

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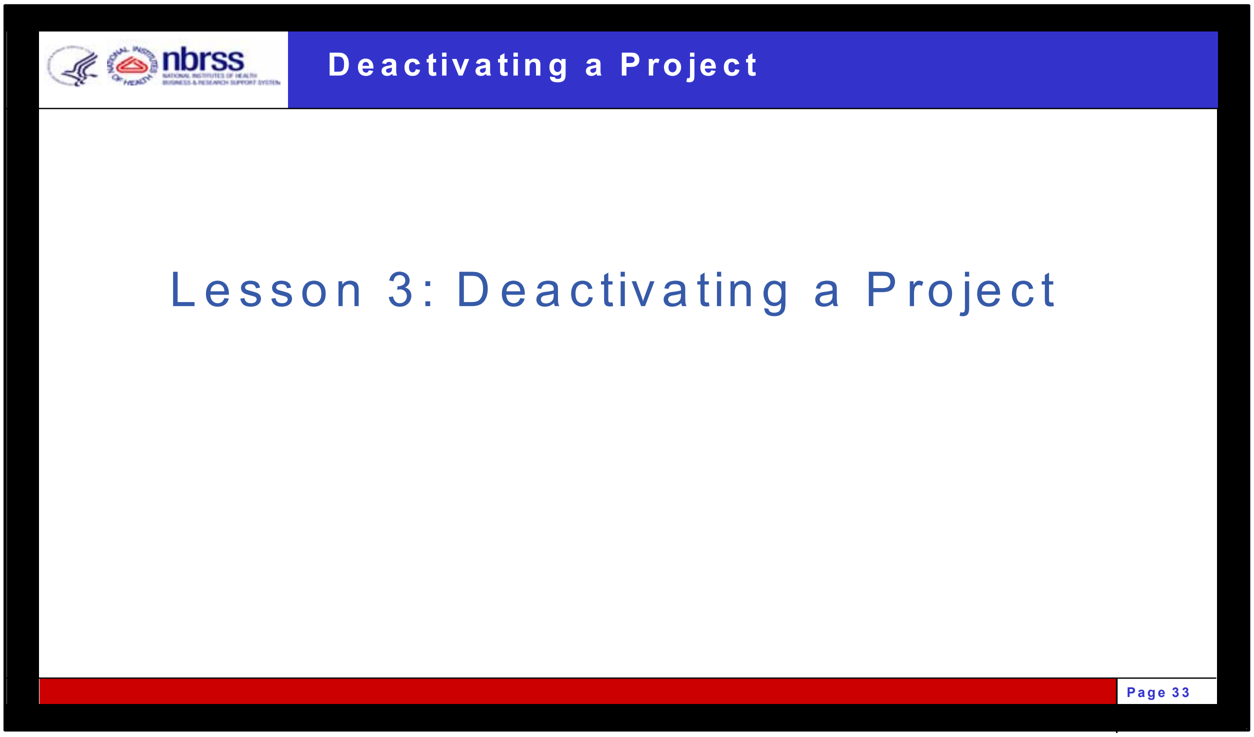
Deactivating a Project



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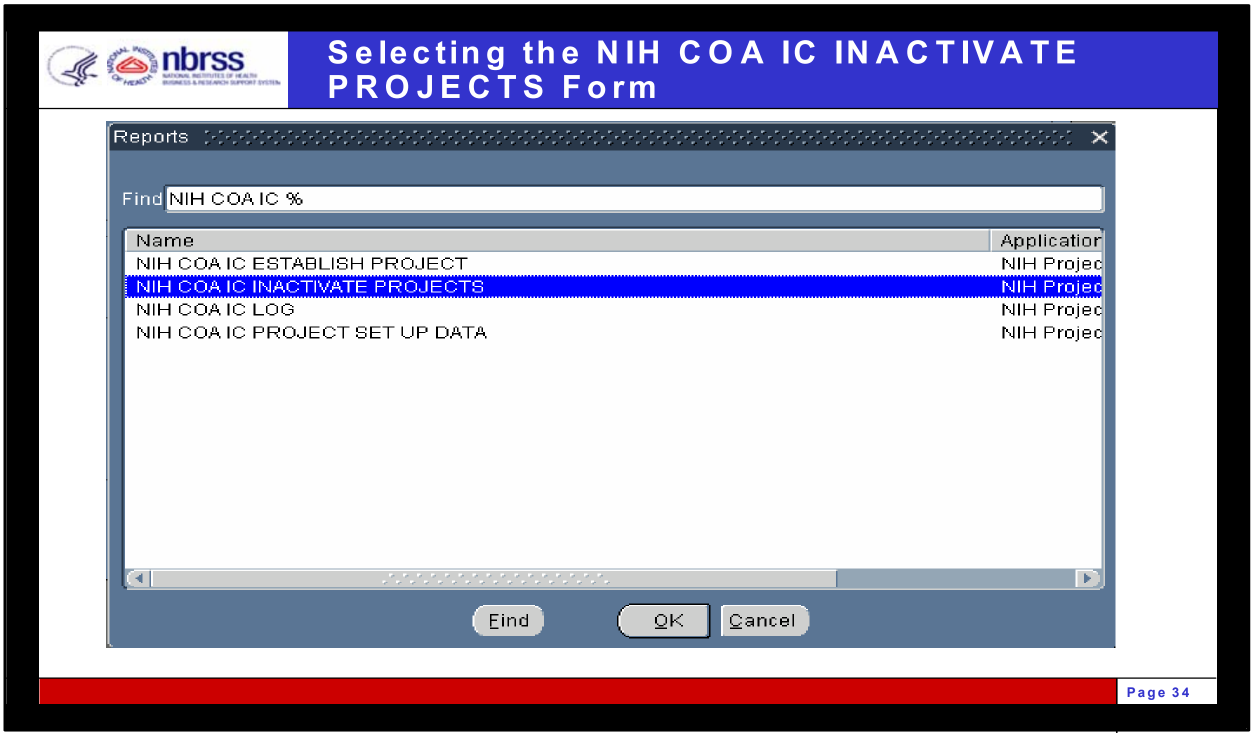
Selecting the NIH COA IC INACTIVATE PROJECTS Form



- You also have the capability within the NBS to inactivate projects (CANs) you are no longer using. A separate form has been created for inactivating projects.

- You will use the Submit Request window to pull up the form used to enter your project inactivation request. This form is called the NIH COA IC INACTIVATE PROJECTS form.

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Overview of the Project Inactivation Form

- When you select the NIH COA IC INACTIVATE PROJECTS value, the deactivation request form will appear.

- You will use this deactivation request form to identify the Projects you want to deactivate. Remember, all fields with yellow backgrounds are required fields.

- You can forward any comments or special instructions to OFM in the Comments field.

- The Process Immediately field indicates whether OFM should process the deactivation immediately or if the requestor wants to submit the request at a later date. The default value is “Y” (“Yes”) for immediate processing.

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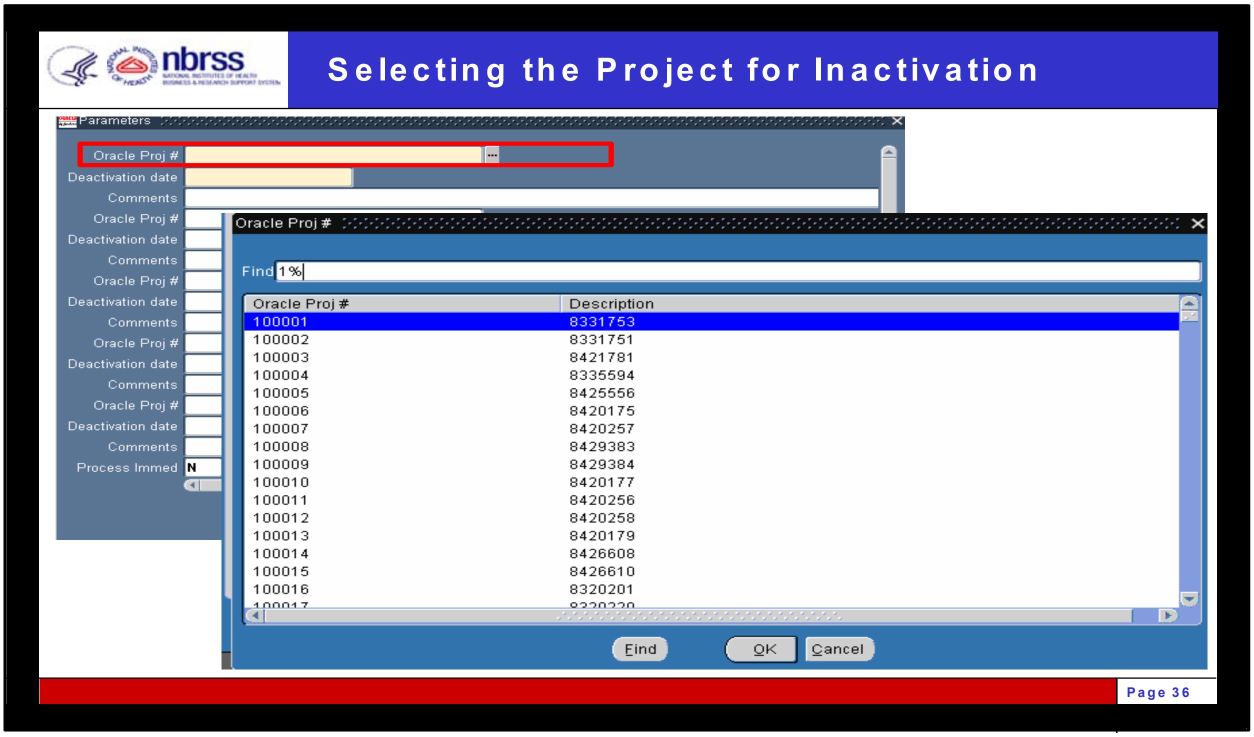
Selecting the Project for Inactivation



- You must enter at least one Oracle Project #, but may deactivate up to five projects at the same time.
- Use the LOV to locate the Project you want to deactivate.
- You can search on either the Project # or the corresponding CAN. If you would prefer to search on the CAN you will need to use the % sign as a wild card at the beginning of the value.

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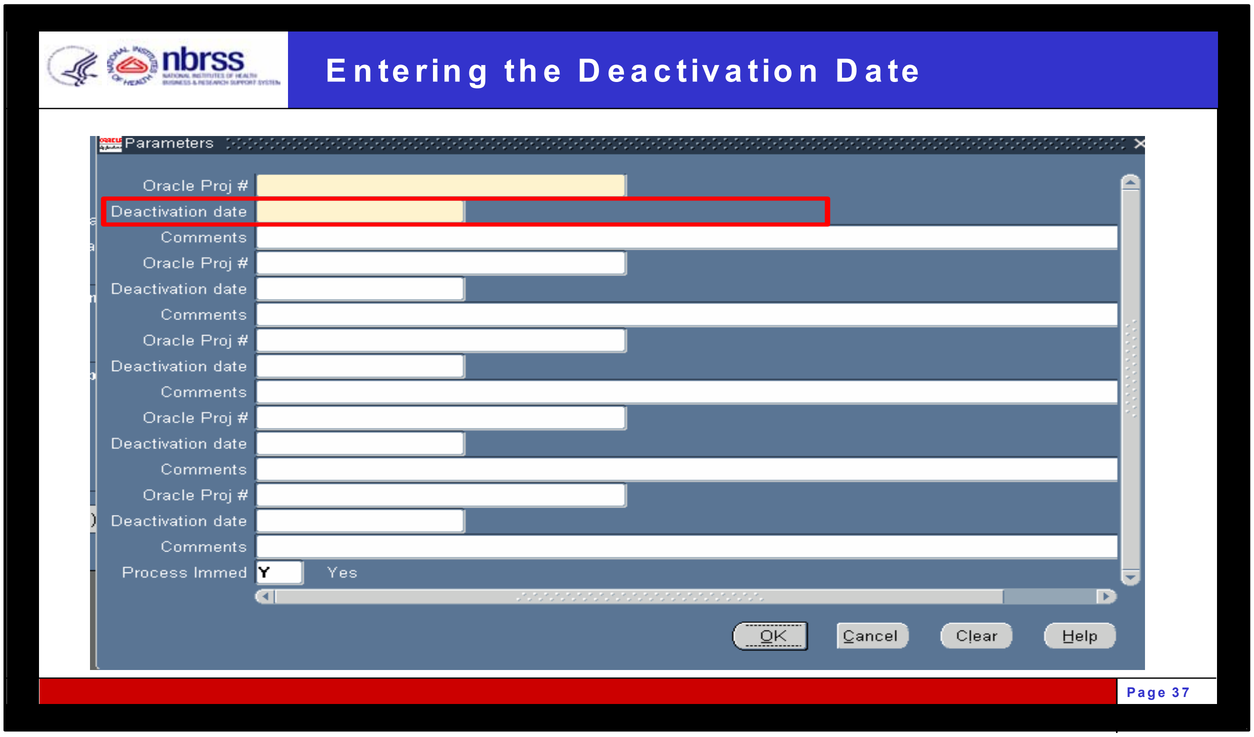
Entering the Deactivation Date



- The Deactivation Date is the last day the Project will be able to incur obligations.

- If you want the deactivation to be immediate, use the current date as the Deactivation Date.

- The Deactivation Date can also be used to identify a future point in time when you want the deactivation to go into effect, such as the end of the fiscal year. In this case, you would enter 30-SEP-2003 as the Deactivation Date, and OFM would process the deactivation to be effective as of that date. This date prevents use in FY 2004.

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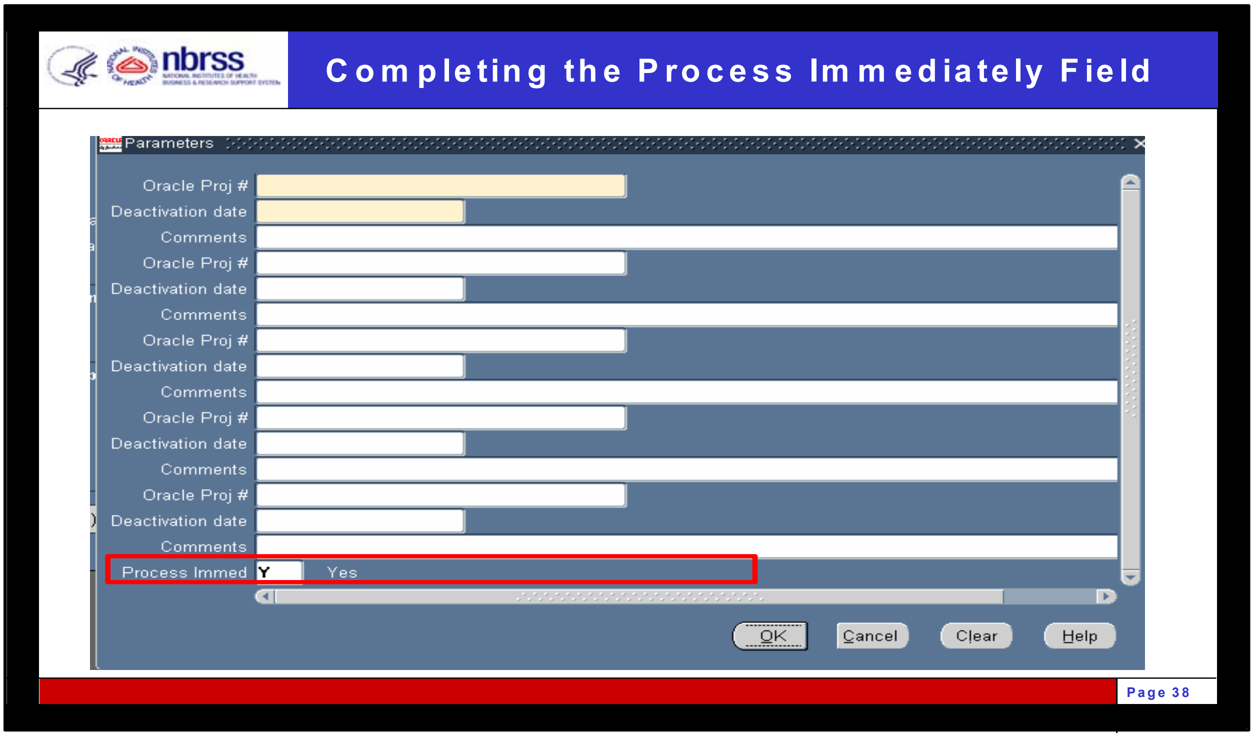
Completing the Process Immediately Field



- You will also need to fill in the Process Immediately field.
- If you enter "Y" for Yes, the system will automatically forward your request to OFM.
- If you enter "N" for No, your request will go into a "pending" status and will require a separate step to submit the request to OFM.

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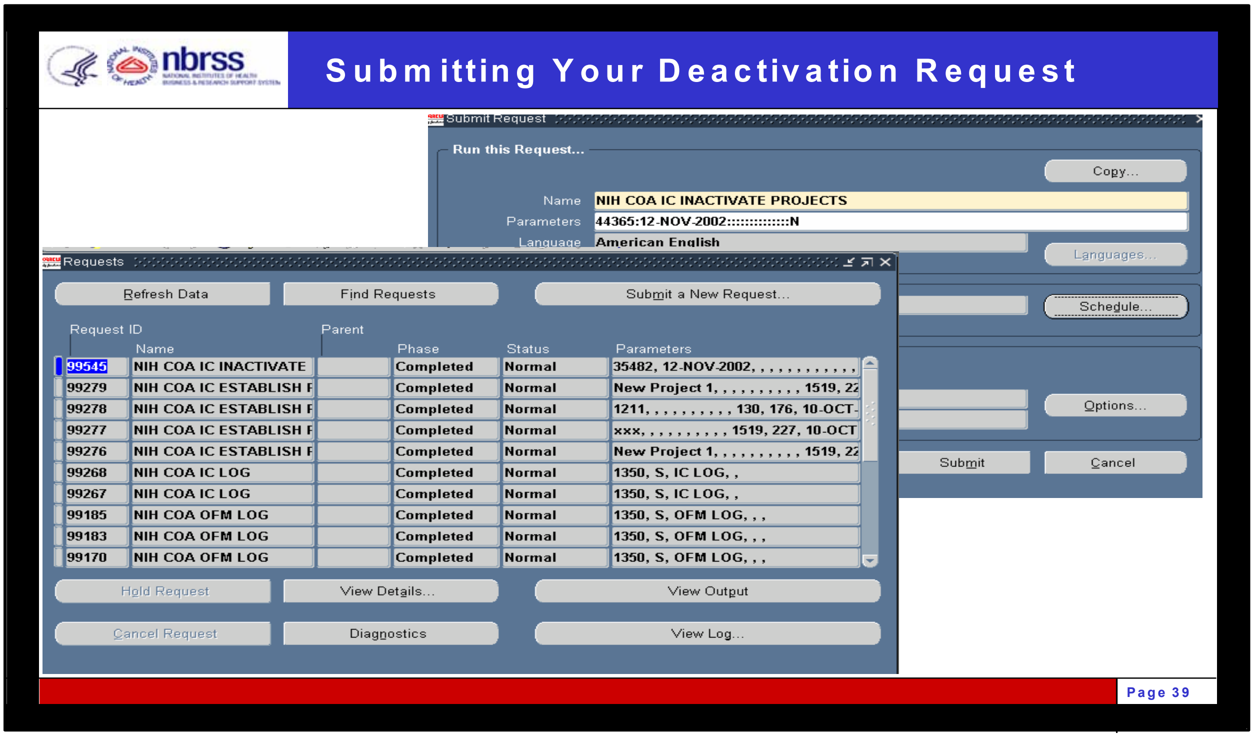
Submitting Your Deactivation Request



- Once you have entered all the fields for your deactivation request, you can submit your request by clicking on the **Submit** button.

- If you selected process immediately, your request will go directly to OFM for setup when you click the Submit button.

- If you choose not to process immediately, your request will be placed on a pending status until further review and final submission.

- After you submit your deactivation request, the Requests screen will appear, displaying your request ID and the phase and status of your request.

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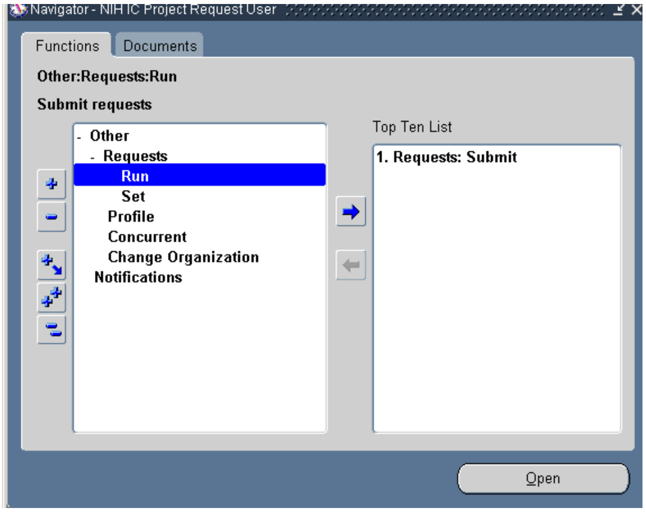
Deactivating Projects

NIH IC Project Request User N>Other>Requests>Run Submit a New Request

1. From the Oracle Navigator, double click on the **Other** function.

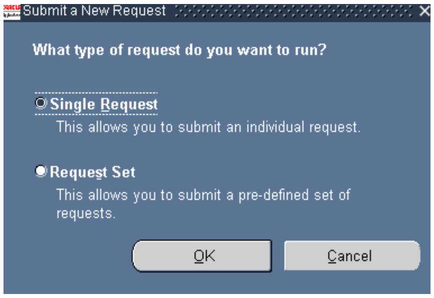
2. Double click on the **Requests** Function.

3. Double click on the **Run** function or highlight the **Run** function and click the **OK** button.



Result: The **Submit a New Request** pop-up window is displayed.

4. Select **Single Request** and click on the **OK** button.



Result: The **Submit Request** window will appear.

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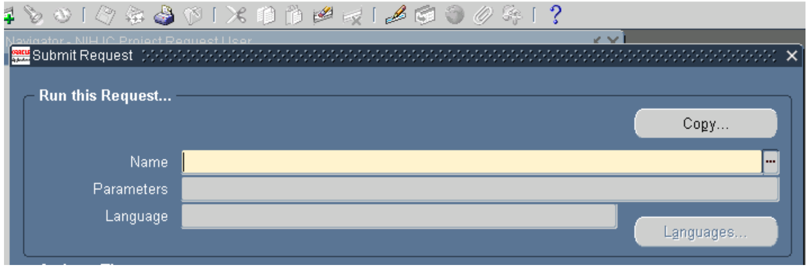
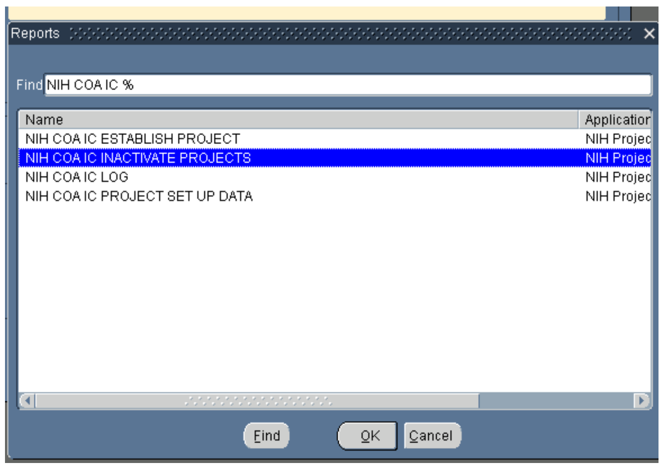


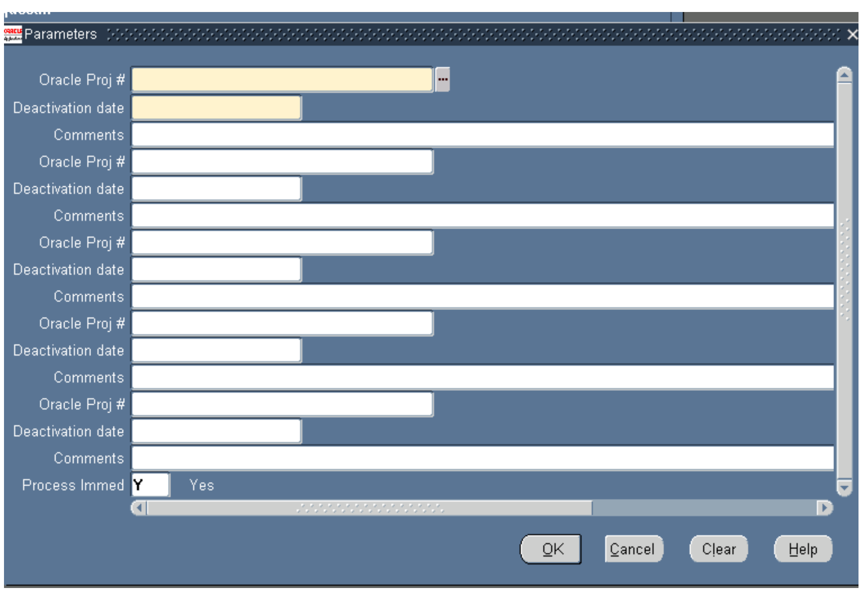
5. In the **Name** field, click on the **List of Values (LOV) icon**.

   Result: The Reports LOV will appear.



6. From the LOV, select the **NIH COA IC INACTIVATE PROJECTS** value and click the **OK** button

   Result: The NIH COA IC INACTIVATE PROJECTS **Parameters** window will appear.



7. Click the LOV next to the Oracle Proj # field

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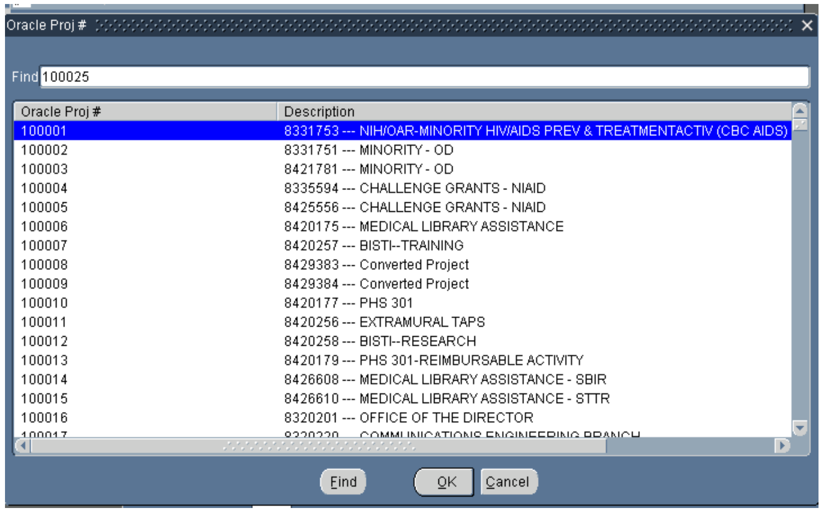
Result: The List of Values displaying Oracle Project #s and Descriptions will appear.



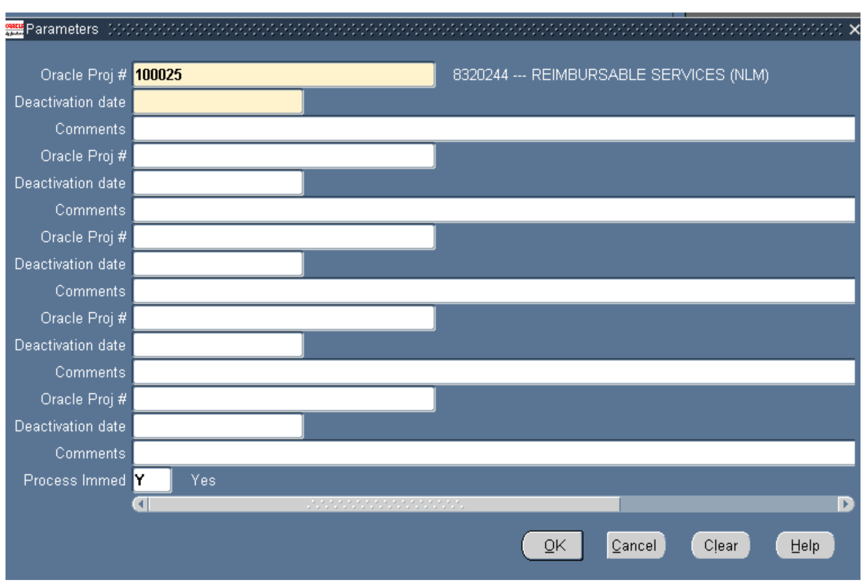
8. In the Project # LOV, you can search by Oracle Project Number, if you know it, or by CAN, which is part of the description.

9. To search by Project #, enter the Project Number into the Find field and then click on the Find button.

Result: The Project Number will appear in the Oracle Proj # field.

10. To search by CAN, enter a % into the Find field, followed by the 7-digit CAN, and then click on the Find button.

Result: The Project Number will appear in the Oracle Proj # field, and the related CAN and description will appear in the label.



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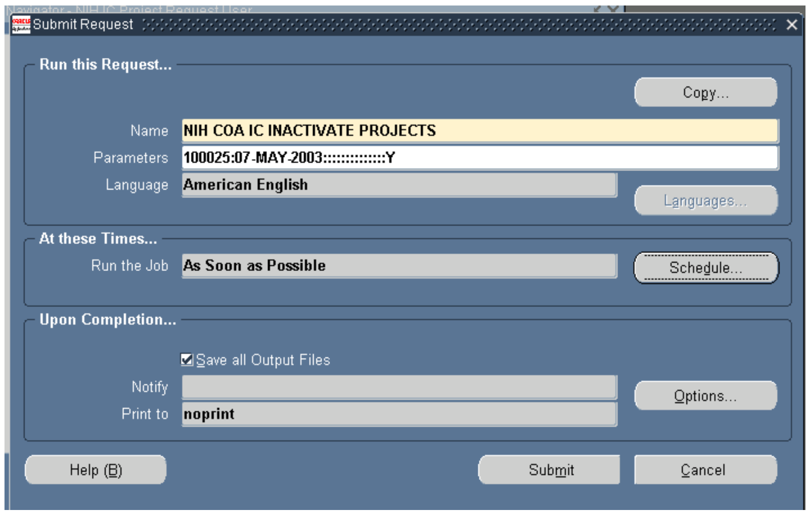
11. Enter the Deactivation date, which is the date you want the project to stop accepting obligations.

12. Leave the default value of "Y" in the Process Immediately field if you want your request to go directly to OFM for process. If you do not want your request to be processed immediately, change the value to "N" for No.

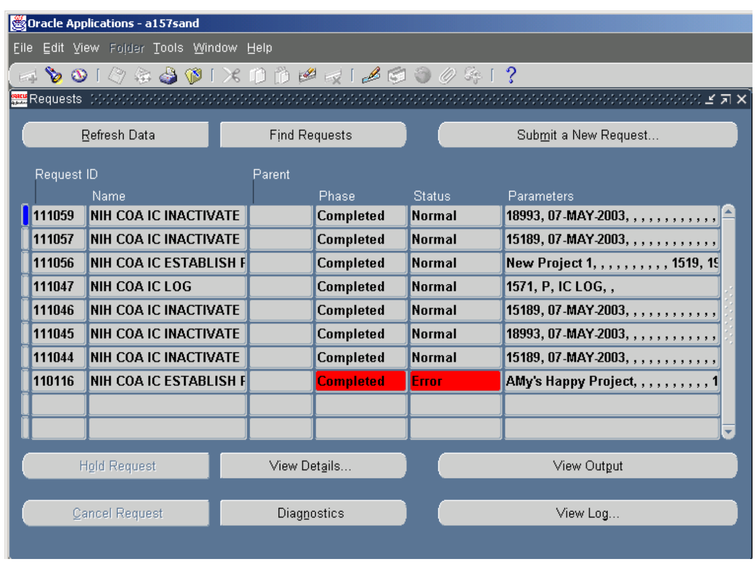
13. Click on the **OK** button.

    Result: You will return to the Submit Request window.

14. Click on the **Submit** button to submit your new project request.



Result: The Request window will appear, listing your latest request at the top. You may want to make a note of the request number for tracking purposes.



15. Click on the **Refresh Data** button until the Phase value for the request changes to completed.

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Result: Your deactivation request has been submitted to OFM because you answered Yes to Process Immediately.

End of activity

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Lesson 4: Working with the Project Request Log

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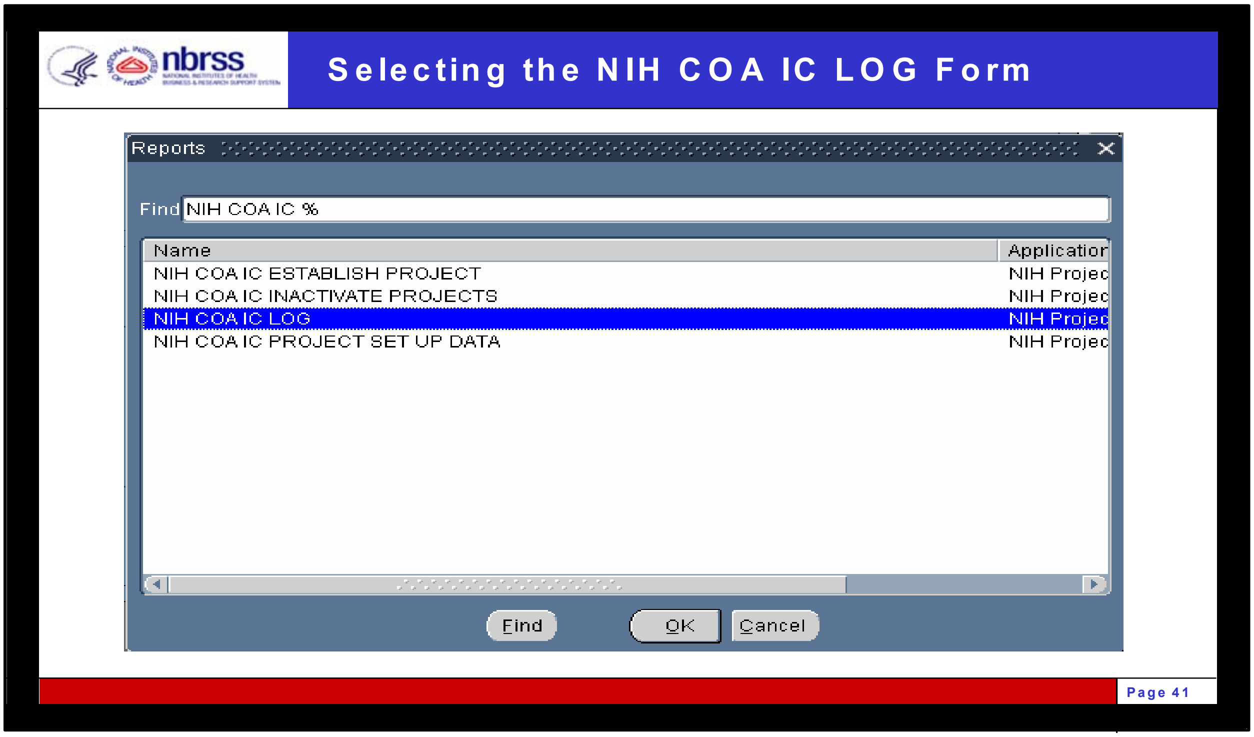
Selecting the NIH COA IC LOG Form



- Selecting the NIH COA IC LOG option enables you to view the status of all requests you have created using Oracle Projects.

- While running the log is an **optional** step, it can be useful in helping you keep track of all of your project requests.

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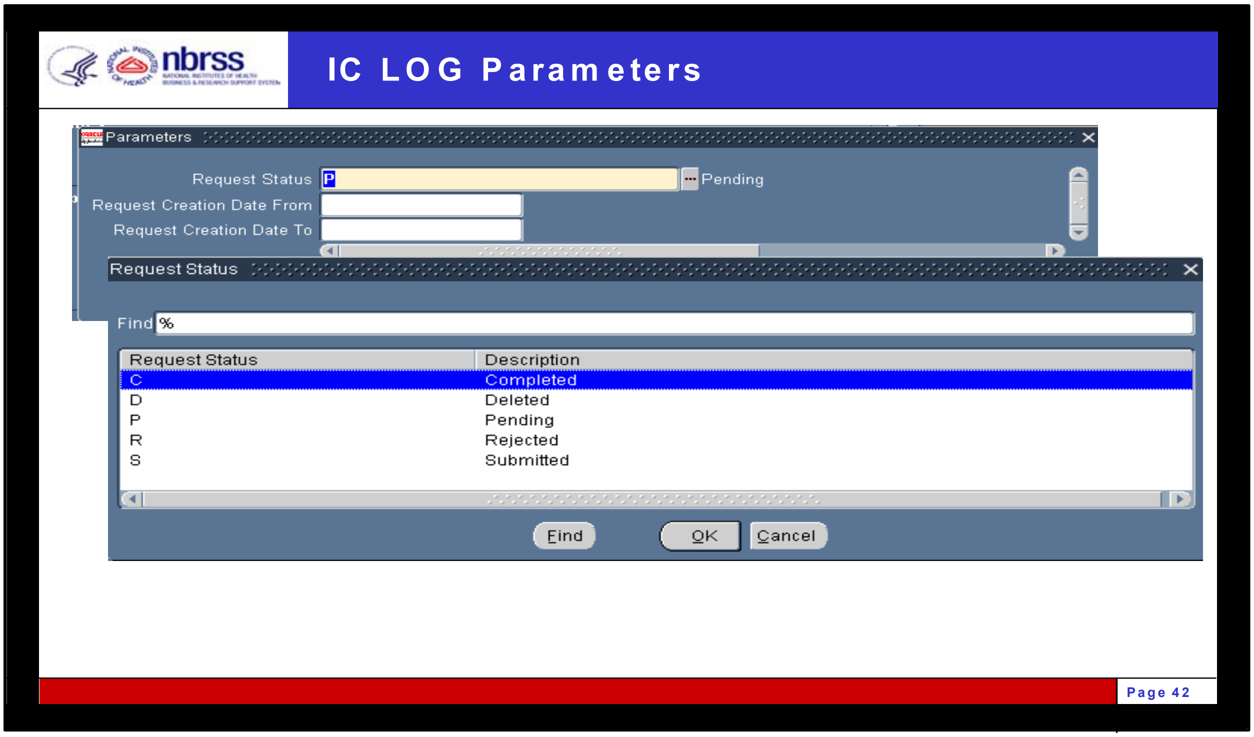
IC LOG Parameters



- The IC Log Parameters window provides information on request statuses, so you can see exactly where your project is in the request process. You can choose to query on the following statuses:

  - A **Completed** status means that OFM has entered the new Project, so the request is complete.

  - A **Deleted** status means the IC has deleted the request using the IC PROJECT SETUP DATA process.

  - A **Pending** status is assigned to all new project requests and inactivation requests that have not yet been submitted to OFM, and are therefore "pending" submission.

  - The **Rejected** status means that some piece of requested information has caused the project to reject. Corrective action by you is needed.

  - A **Submitted** status means that the project has been submitted to OFM, but OFM has not yet entered the request.

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- You can also select a specific date range in which to search for requests.

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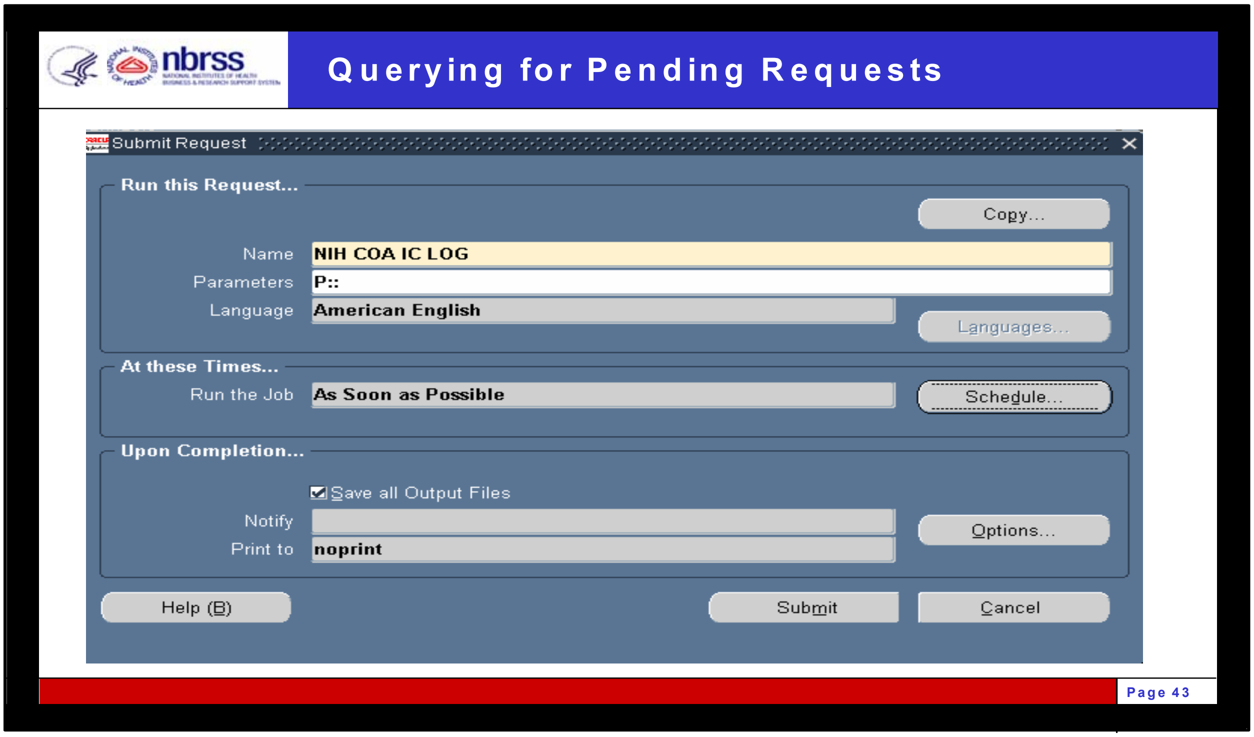
Querying for Pending Requests



- After you select the status of the requests you want to see in the log, you can submit your request to view the log by clicking on the **Submit** button.

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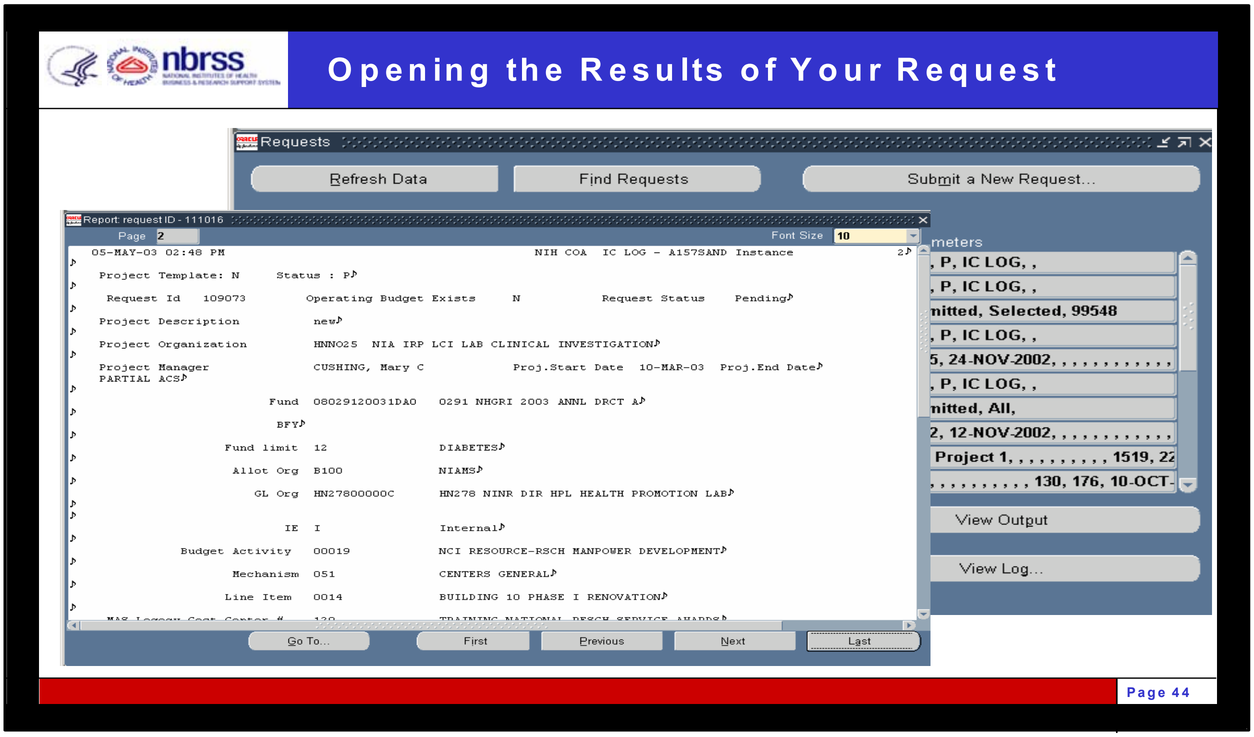
Opening the Results of Your Request



- To view the log, click on the **View Output** button at the bottom of the Requests window.
- New Project requests will always appear at the top of the log and deactivation requests will appear at the bottom of the log.
- Use the **First**, **Previous**, **Next** and **Las**t buttons to navigate through the report.
- Close the log by clicking on the **Close** box on the upper right side of the report window.

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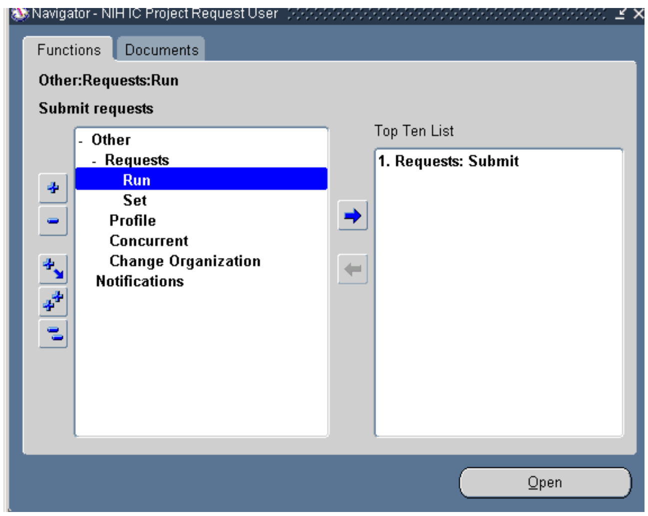
Accessing the NIH IC COA Log

{Insert the appropriate system reference here.}

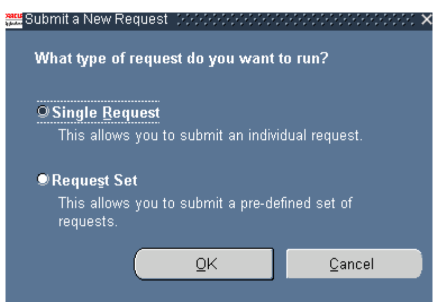
NIH IC Project Request User
N>Other>Requests>Run
Submit a New Request

1. From the Oracle Navigator, double click on the **Other** function.
2. Double click on the **Requests** Function.
3. Double click on the **Run** function or highlight the **Run** function and click the **OK** button.



Result: The **Submit a New Request** pop-up window is displayed

4. Select **Single Request** and click on the **OK** button.



Result: The **Submit Request** window will appear.

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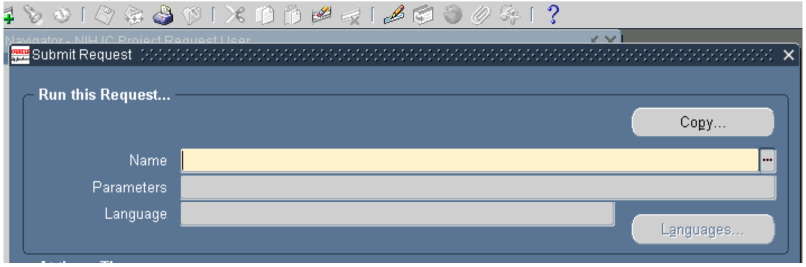
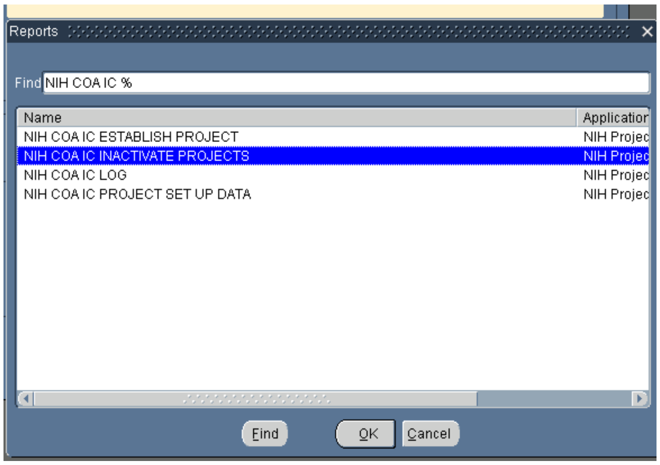


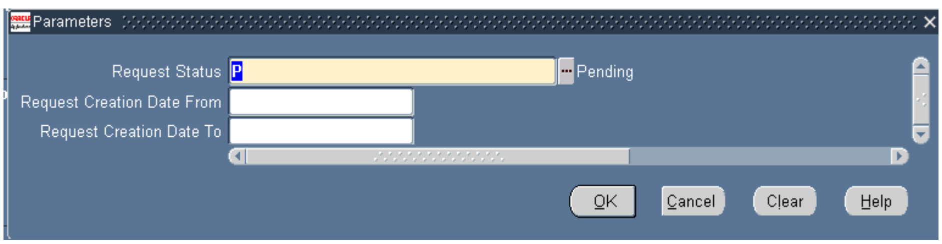
5. In the **Name** field, click on the **List of Values (LOV) icon**.

   Result: The List of Values will appear.



6. From the LOV, select the **NIH COA IC Log** value and click the **OK** button.

   Result: The NIH COA IC LOG **Parameters** window will appear.



7. Leave the default value of P for Pending in the Request Status field.

8. Enter the Request Creation Date From and the Request Creation Date To if desired, or leave blank.

9. Click on the **OK** button.

   Result: You will return to the Submit Request window.

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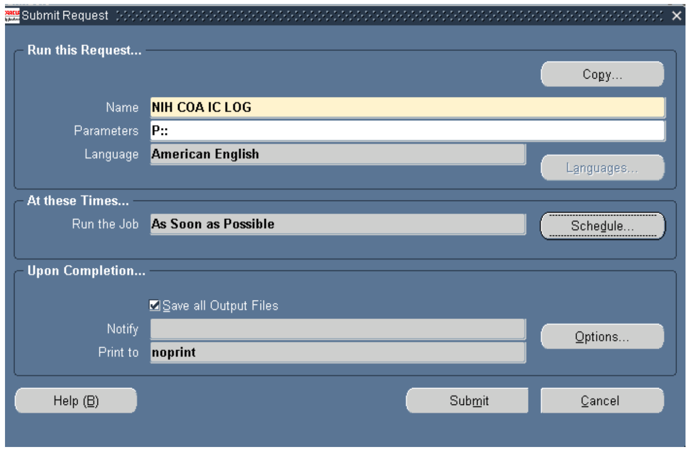
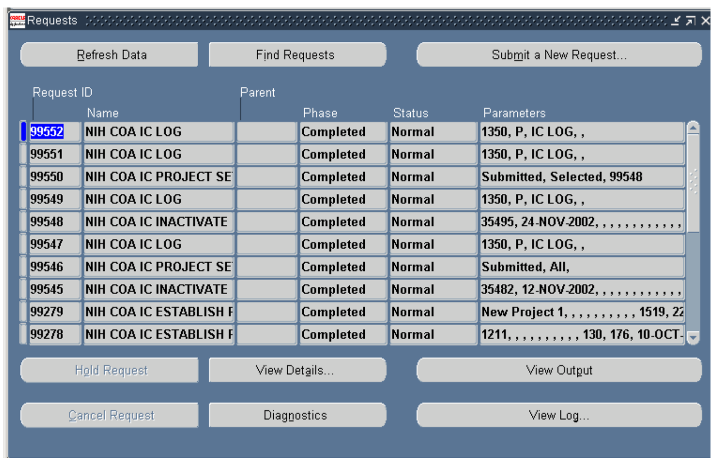


12. Click on the **Submit** button to submit your new project request.

    Result: The Request window will appear, listing your latest request at the top. You may want to make a note of the request number for tracking purposes.



13. Click on the **Refresh Data** button until the Phase value for the request changes to completed.

14. Click on the View Output button to view the request log.

    Result: The log will be appear, displaying all of your pending requests.

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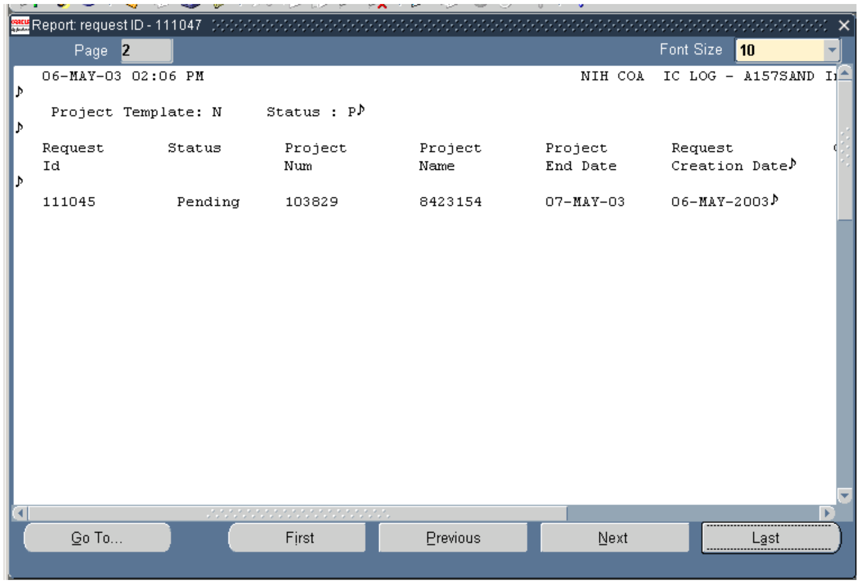

15. Click the **Last** button to move to the bottom of the report, where deactivation requests are displayed.

End of activity

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Submitting or Deleting Pending Requests

Submitting or Deleting Pending Requests

Lesson 5: Submitting or Deleting Pending Requests

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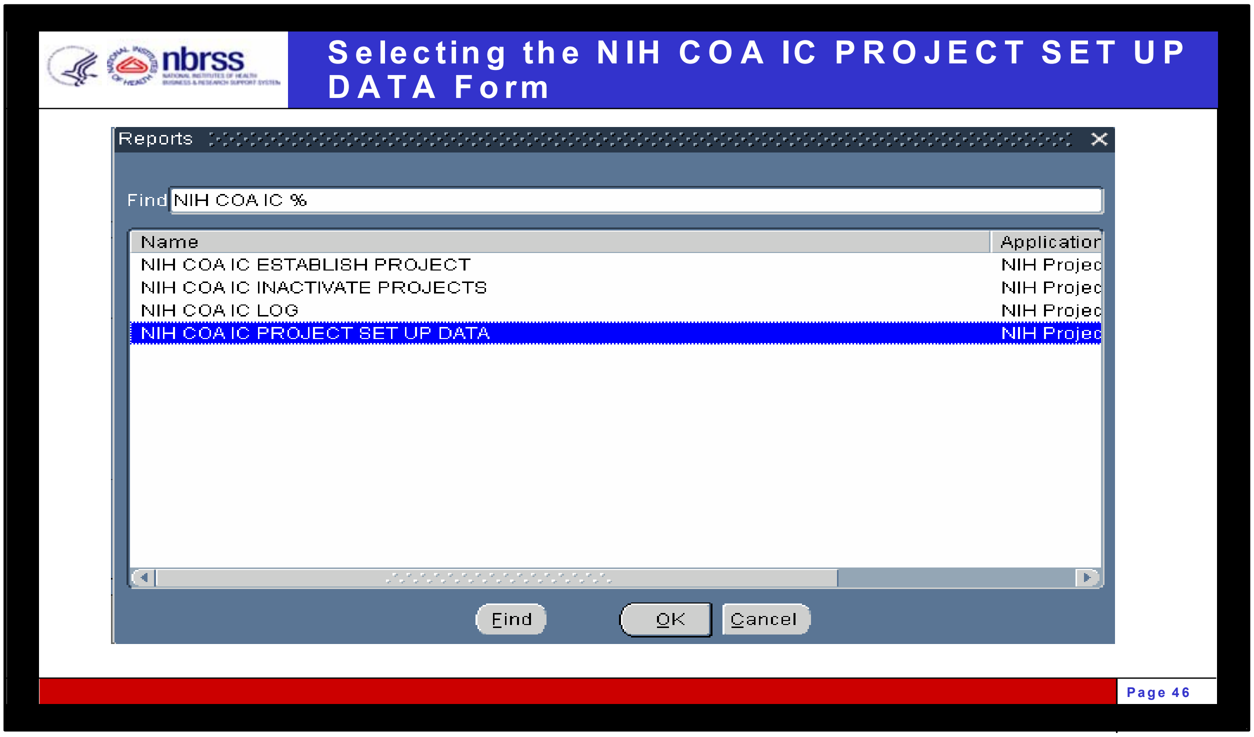
Selecting the NIH COA IC PROJECT SET UP DATA Form



- If you have any pending new project or deactivation requests, you will use the NIH COA IC PROJECT SET UP DATA form to either submit or delete these requests. You will have pending requests if you overrode the "Process Immediately" option in the Project Request or Deactivation Request forms.

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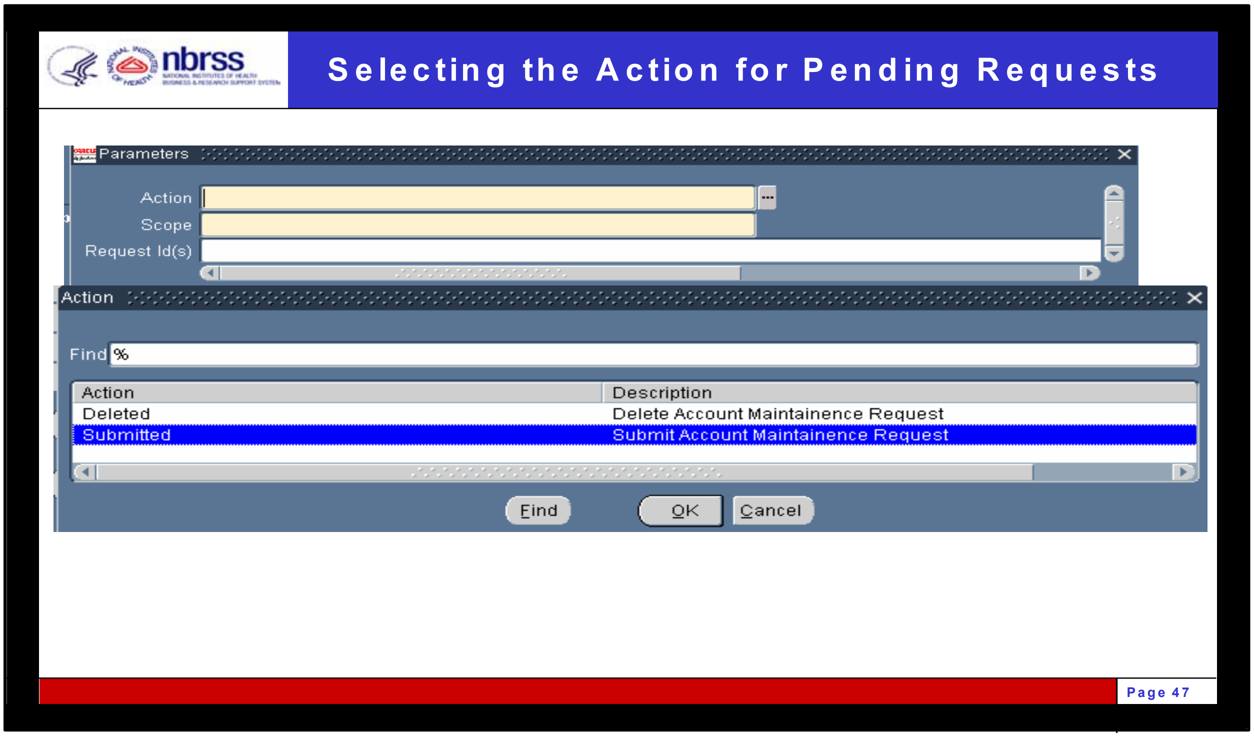
Selecting the Action for Pending Requests



- You will need to select the action you want to take with your pending requests. You have two choices of Actions to take:

- Select "Submitted" if you want to forward the request to OFM.

- Select "Deleted" if you want to delete the pending request.

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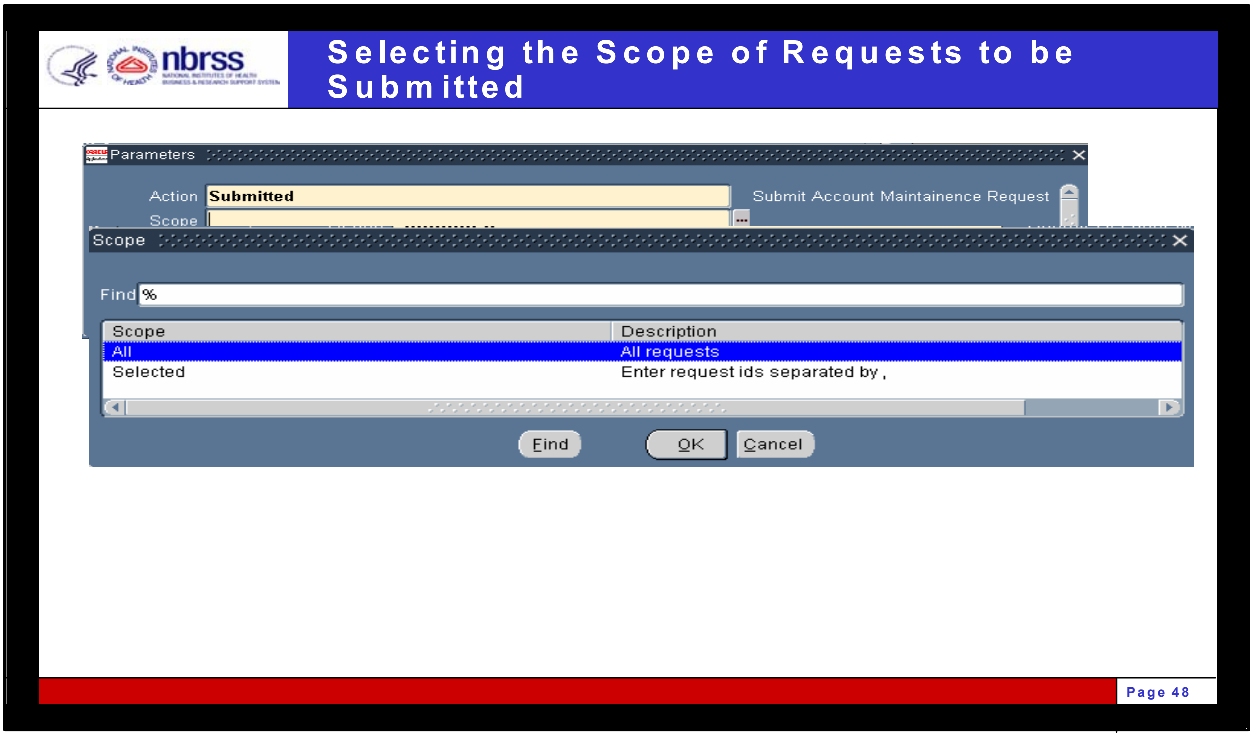
Selecting the Scope of Requests to be Submitted



- You will also need to select the Scope of the requests you would like to submit.
- Select "All" to take action on all pending requests.
- Select "Selected" if you would only like to take action on certain pending requests. When the scope field is populated with "Selected" a request number must be designated.

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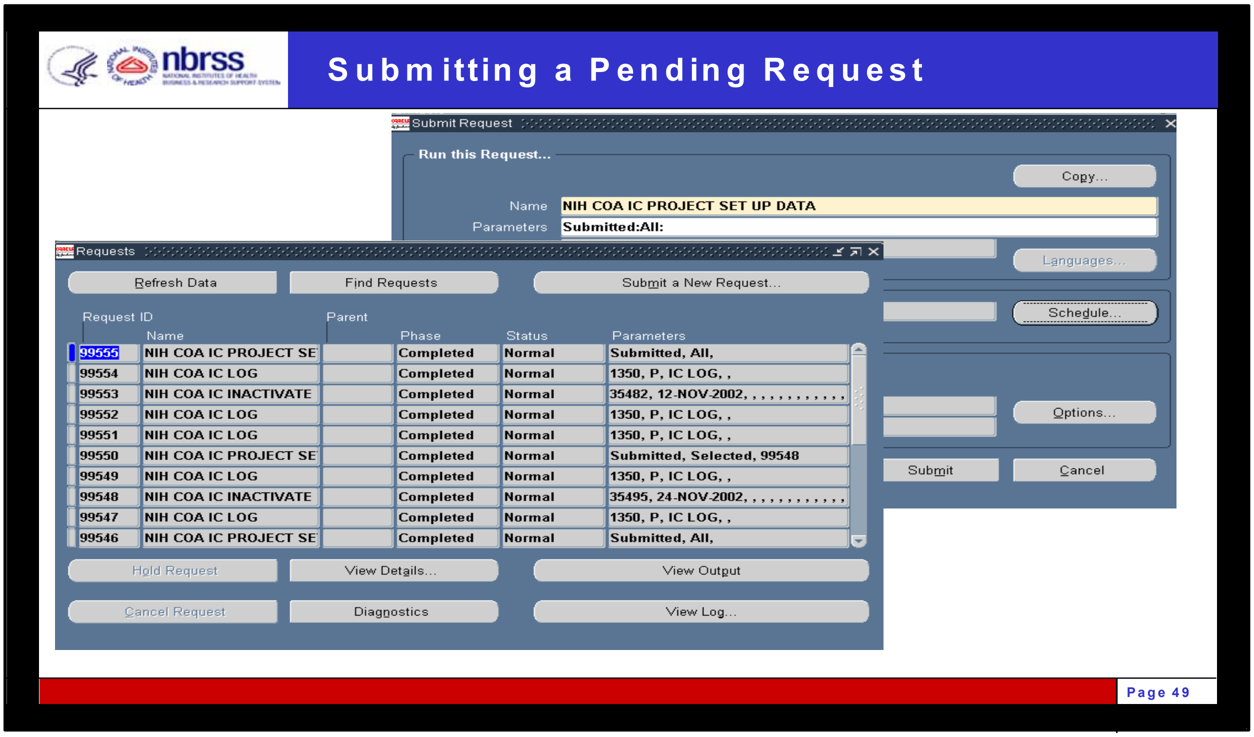
Submitting a Pending Request



- After you select the action and scope for your pending requests, you can submit your request by clicking on the **Submit** button.

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Accessing the NIH COA IC Project Setup Form

NIH IC Project Request User

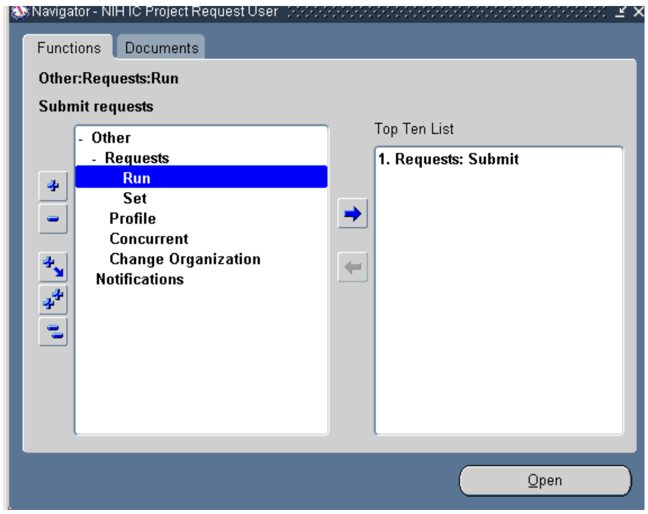
N>Other>Requests>Run

Submit a New Request

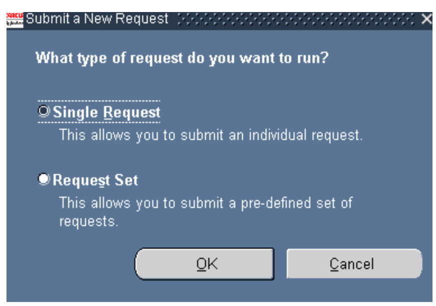
1. From the Oracle Navigator, double click on the **Other** function.

2. Double click on the **Requests** Function.

3. Double click on the **Run** function or highlight the **Run** function and click the **OK** button.



Result: The **Submit a New Request** pop-up window is displayed.



4. Select **Single Request** and click on the **OK** button.

Result: The **Submit Request** window will appear.

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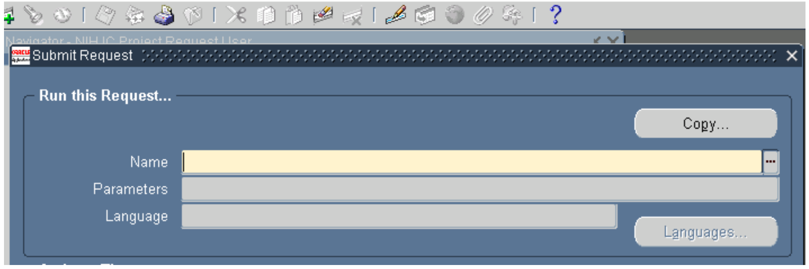
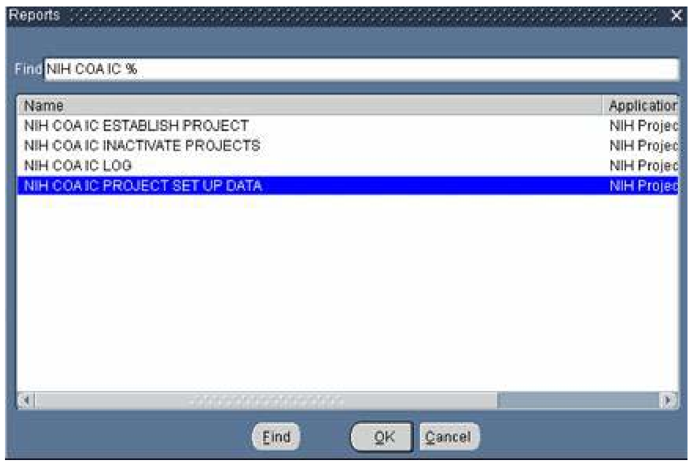


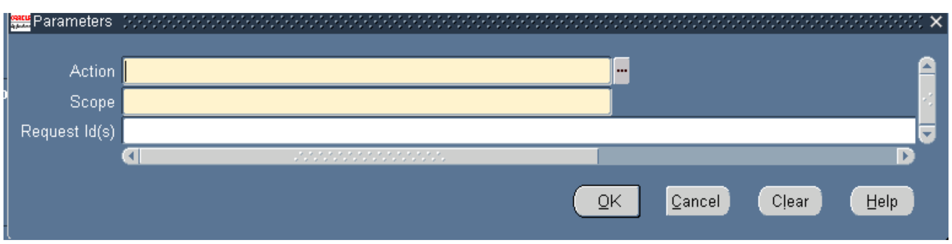
5. In the **Name** field, click on the **List of Values (LOV) icon.**

Result: The List of Values will appear.

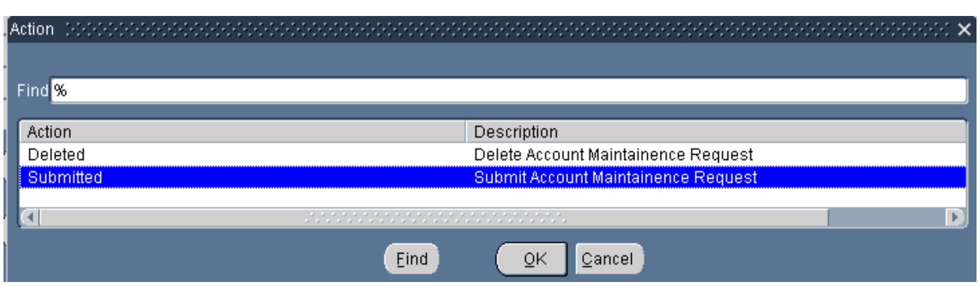


6. From the LOV, select the **NIH COA IC PROJECT SETUP DATA** value and click the **OK** button.

Result: The NIH COA IC PROJECT SETUP DATA **Parameters** window will appear.



7. Click on the LOV for the Action field.



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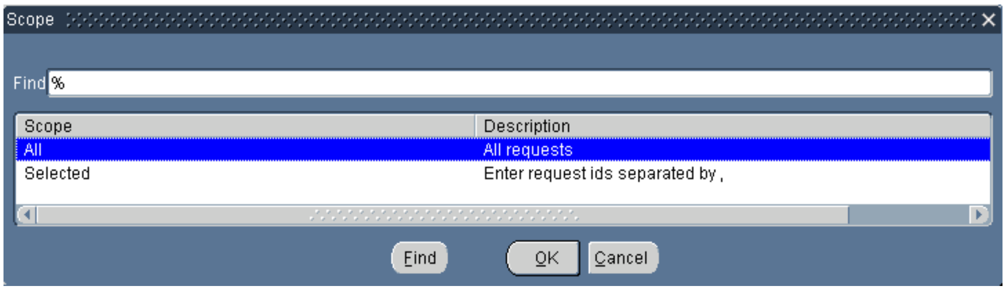
8. Select **Submitted** from the LOV if you want to submit the pending requests, or select **Deleted** from the LOV if you want to delete the pending requests.

Result: The value you selected will appear in the Action field.

9. Click on the LOV for the Scope field.



10. Select **All** to submit all pending requests, or choose **Selected** to submit only those requests you select.

11. If you chose Selected, you will need to enter the specific Request Ids you want to submit in the Request Ids field.

12. When you have finished completing the Parameters screen, click on the OK button.

Result: you will return to the Submit Request window.

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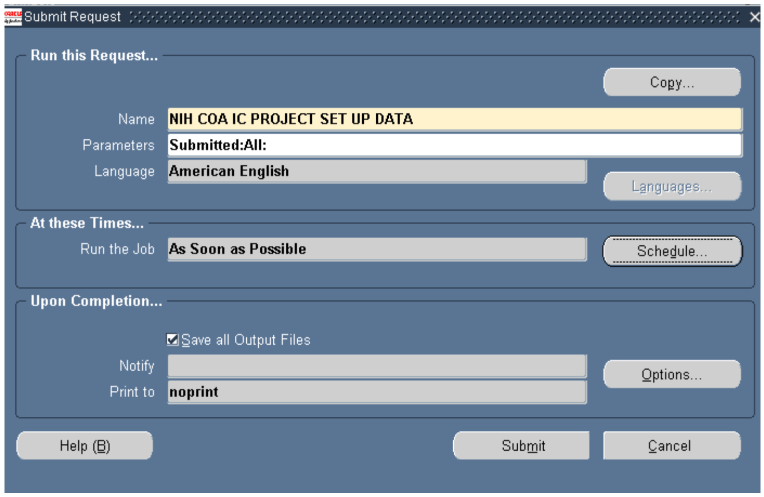
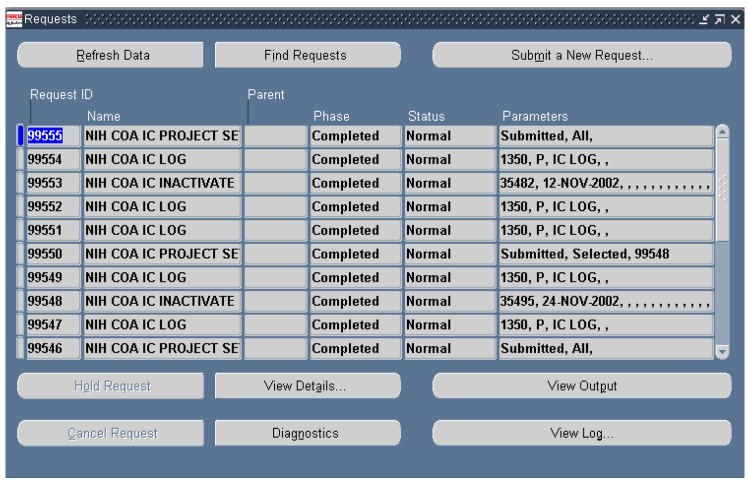


13. Click on the **Submit** button to submit your new project request.

<u>Result</u>: The Request window will appear, listing your latest request at the top. You may want to make a note of the request number for tracking purposes.



14. Click on the **Refresh Data** button until the Phase value for the request changes to completed.

<u>Result:</u> Your pending request has been submitted to OFM.

End of activity

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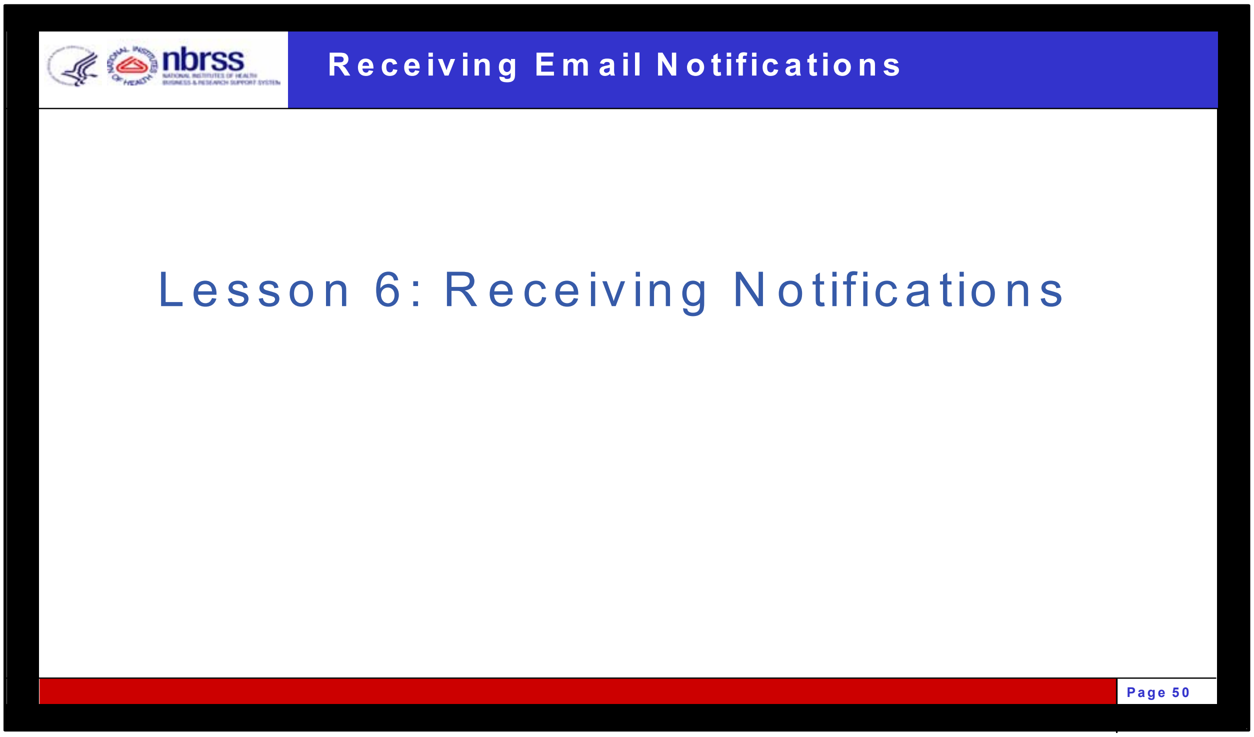
Receiving Email Notifications



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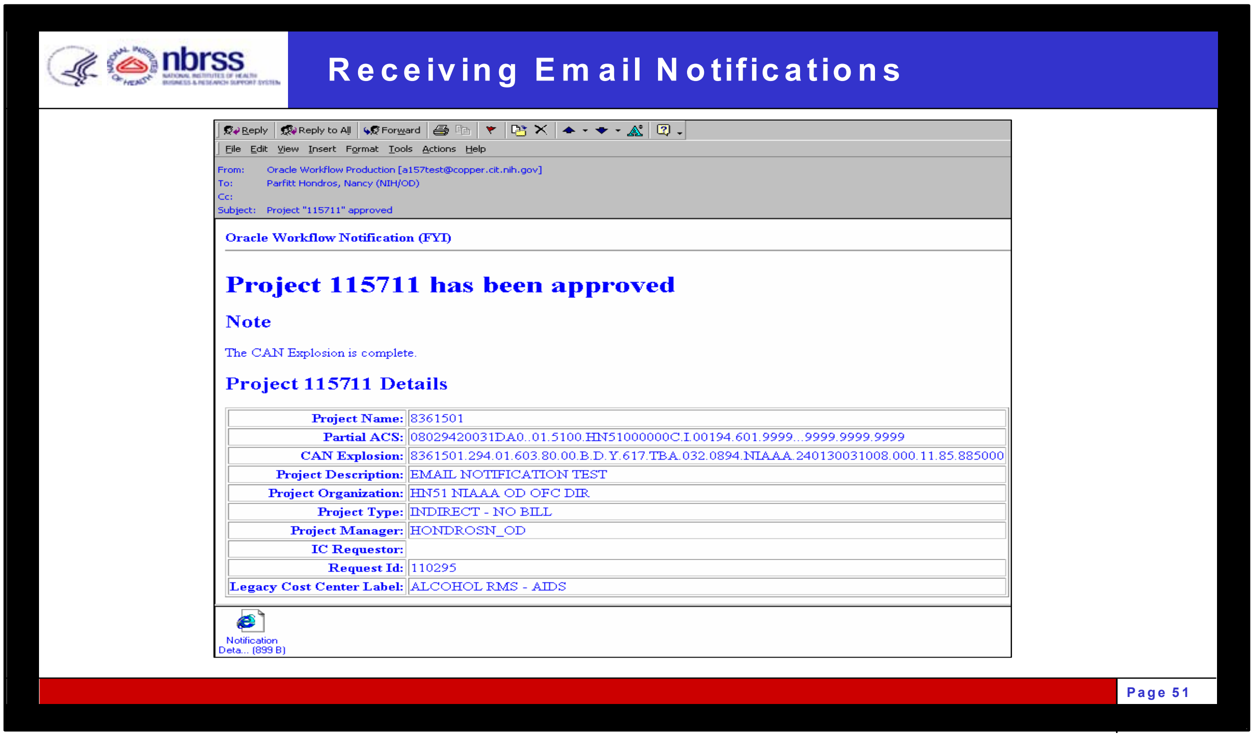
Receiving Email Notifications



- Once OFM establishes a Project, the Project Manager and the Requestor will receive a notification that the new Project has been created and approved.

- If your email address in the NIH Enterprise Directory (NED) is correct, the notification will be emailed to this address automatically.

- If you do not know how to verify your email address with NED, you can contact the CIT Technical Assistance Support Center on 4-6248 or email them at mailto:tasc@nih.gov.

- It is not necessary to click on the attached notification icon. This is required by the system to close the notification and generate the email. It will tell you there is an error. **IGNORE this message!**

- Requestors may receive an additional email notification when OFM completes the NIH COA OFM Project Setup step.

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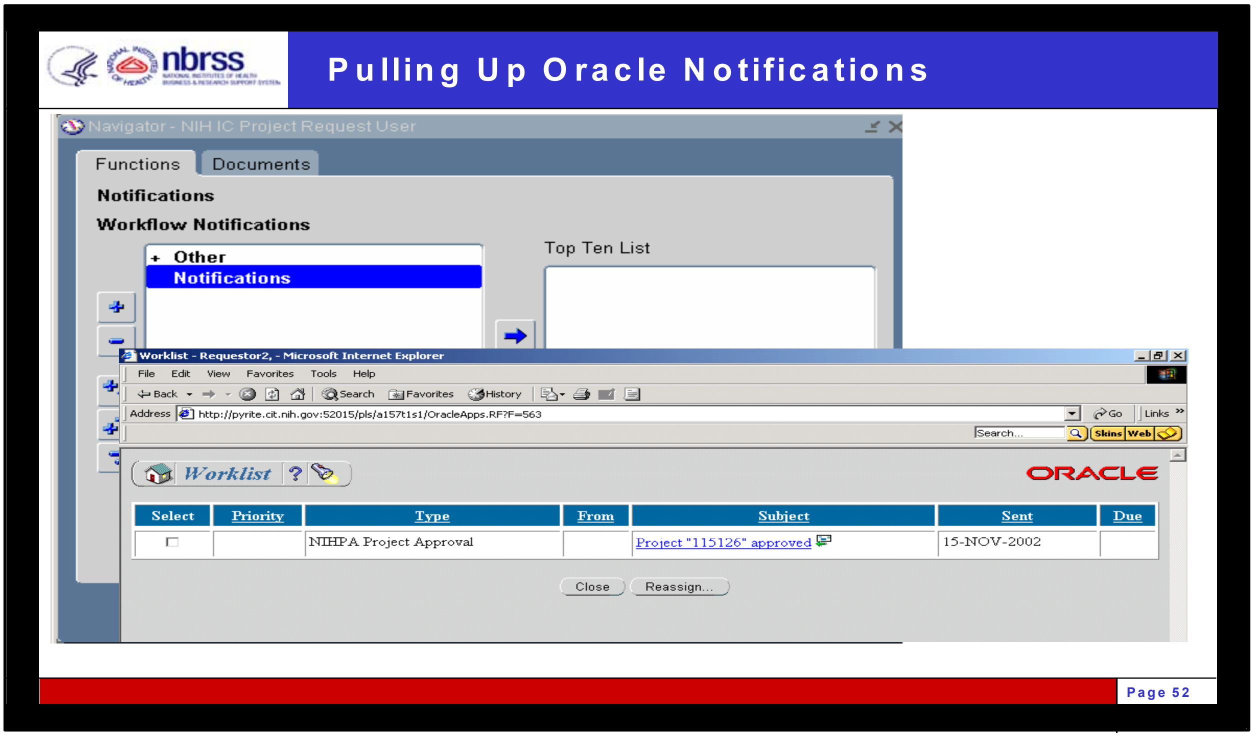
Pulling Up Oracle Notifications



- If NED does not contain your correct email address, you will need to access notifications through Oracle.

- Click on the Notifications function and click on the **Open** button or double click on the Notifications function.

- Click on the link of the project notification you would like to view.

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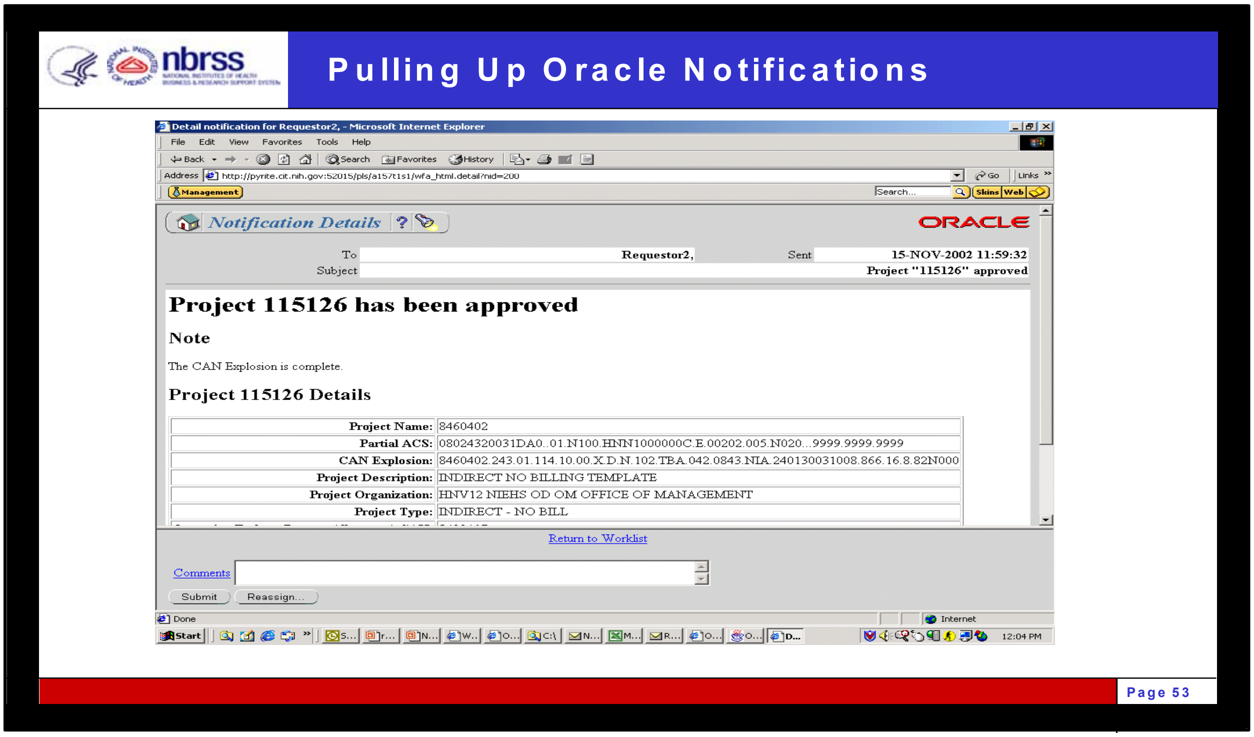
Pulling Up Oracle Notifications



- The Requestor and Project Manager will see the notification details

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